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ABSTRACT

Developed by a team of strategists to help local school districts in Michigan win school millage elections, this manual details the factors that go into a successful election campaign. The campaign is broken into five phases: building a coalition, surveying and gathering information, developing a campaign theme and campaign plan, identifying and persuading supporters, and getting supporters to the polls. Sections of the manual cover the special characteristics of millage campaigns: organizating the campaign staff and establishing the roles of its members; planning the campaign calendar; organizing special committees and running meetings; establishing a file on voters; surveying the community; and packaging the ballot question. Other sections cover using written materials; canvassing; using phone banks; watching the polls; obtaining and using volunteers; raising funds; working with the media; the roles of school employees, students, and community organizations; and postelection activities. Appendixes include such resource materials as sample forms, guides for interviewers and evaluators, questionnaires, and campaign theme ideas. (PGD)

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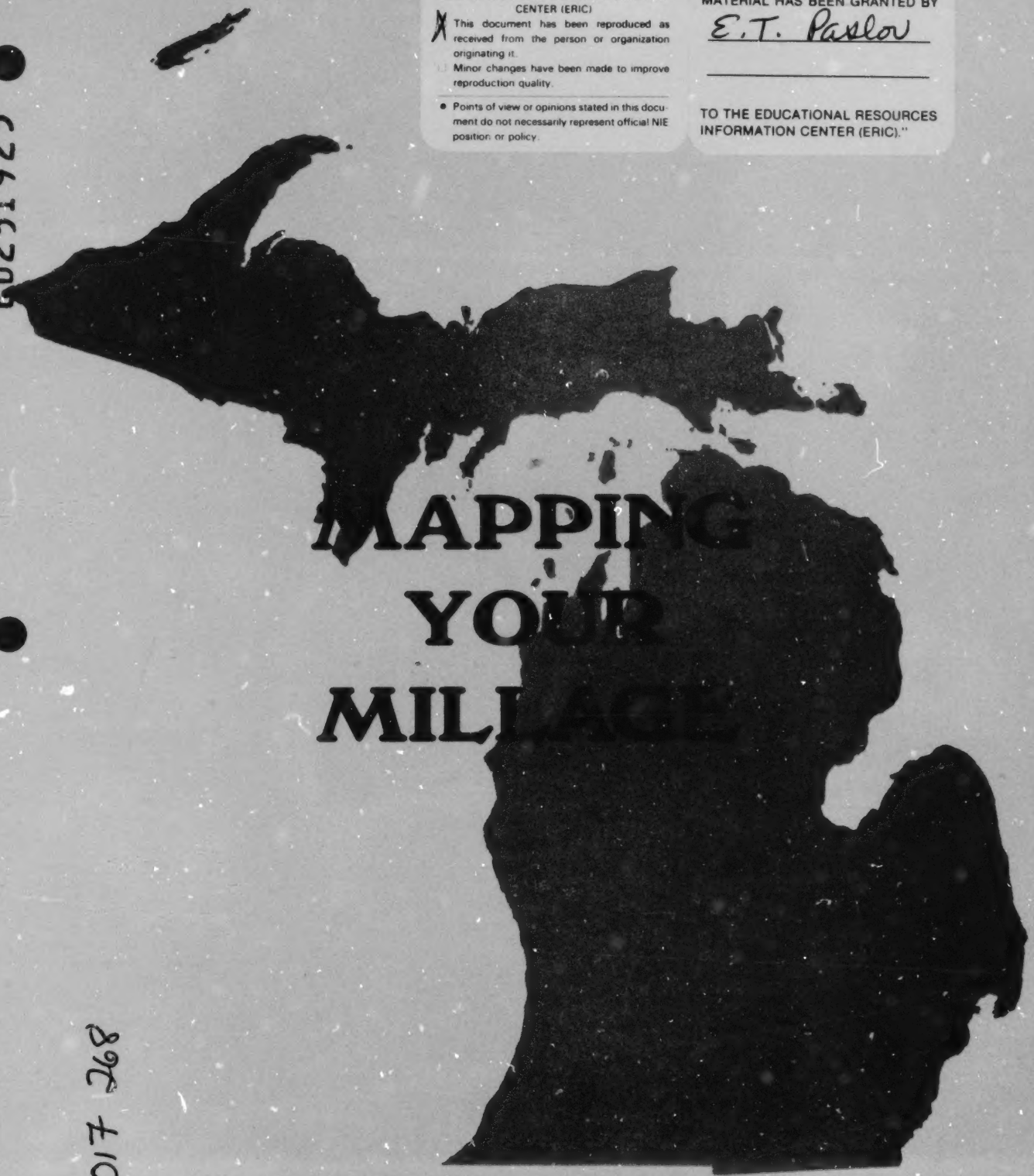

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MAPPING YOUR MILLAGE

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Michigan Education Association

Michigan Federation of Teachers

April, 1984

Foreword

People concerned about curriculum, taxes, property values, or many other community issues are organizing to express their concerns at the ballot box. Millage campaigns have been and continue to be a fact of life in public education.

During the past several years, a special "millage team" has helped communities throughout Michigan prepare for school millage campaigns. This "team" is composed of persons from the Michigan Association of School Boards, Michigan Education Association, Michigan Association of School Administrators, and Michigan Federation of Teachers who have worked cooperatively with staff from the Michigan Department of Education. Many campaign techniques have been developed or improved through this "team's" efforts, and positive election results attest to their effectiveness. This manual details the approaches advocated by "millage team" members.

Why are some campaign groups successful and others unsuccessful? How are effective campaigns organized? Where are volunteers found? How are funds solicited to meet campaign expenses? What is the role of school personnel in elections? When should ...

This manual provides information on these topics and others which arise in local ballot question campaigning. Naturally, philosophies and procedures described in the manual are not the only ways to think and do in school millages, but they have proved successful in campaigns throughout the state.

The State Board of Education is making this manual available as a resource for school districts. It is in looseleaf form so that it may be taken apart and copied for use by the several volunteers and committees needed in a school millage election. Also, by being in looseleaf form it will be easy to add supplemental "hints and tips" for millage workers as they are identified by the "millage team" or other sources. In the meantime, use the ideas in this manual to help citizens understand millage issues so that schools can continue to operate high quality educational programs for the benefit of the children of Michigan.

Phillip E. Runkel
Superintendent of Public Instruction

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Where Do We Start?

When you first open this manual, it is easy to become overwhelmed with the volume of activities to be done -- and it does seem like quite a chunk to bite off. This section will help you "get a handle" on things by providing an overview of what a comprehensive campaign looks like and how each piece fits into the whole.

Hopefully, you have six months to a year to conduct a thorough campaign effort. If this is the situation, great. You have the time to plan ahead and implement the kind of campaign that will win. This manual is organized on the assumption that sufficient time is available. Sometimes however, you don't have that amount of time. The Section, "Calendar", contains suggested activities for campaigns of varying lengths of time.

Believe You Can Win

Perhaps the most important place to start is to BELIEVE YOU CAN WIN. People care about education. They want schools in their community to be good schools. And, as the section on "Getting Organized" points out, the votes needed are almost always there. Winners believe they can win. YOU MUST BELIEVE THAT YOU CAN WIN.

A Campaign Has Five Phases

Each aspect of a campaign will be developed in greater detail in later sections. However, an overview of what goes into a typical, well run campaign will be helpful in seeing how each part of the puzzle fits with the others. To simplify the campaign, look at it as having five key phases:

1. Build a solid coalition.
2. Survey and gather important information.
3. Create a theme and develop a campaign plan.
4. Identify and persuade supporters.
5. Turn out the supporters.

Coalition building should begin as early as possible. In fact, it should be an on-going activity. Learning to work together, to help each other attain goals, and to resolve differences are skills that must be developed. By constantly expanding coalitions AND sharpening the skills needed to work together, chances for success in school elections are substantially improved.

An excellent process for building an election

coalition is to involve a broad range of school and community groups in a school needs study about six months to a year before the election. Out of this assessment will come not only an identification of needs, but a working group which is committed to the programs necessary in meeting those needs.

Additional groups are added to the coalition whenever possible. The goal should be to have a strong campaign coalition in place in time to recommend a ballot proposal to the Board of Education and then to develop the overall campaign plan.

The "Surveying and Information Gathering" phase should be completed three months before an election. A key item in this phase is the development or update of a comprehensive file of voters and potential voters for use throughout the campaign. Then, based on the needs identification process in Phase 1, community attitudes and knowledge must now be tested. Costs need to be projected, other data gathered, and an assessment made of how many votes will be needed to win. All this should be completed, analyzed, and reported prior to deciding the ballot proposal.

About eight weeks prior to the election the "Campaign Plan and Theme Development" phase is accomplished. The ballot question is set and a campaign plan developed. The campaign coalition established in Phase 1 must be in place to examine survey data and other information, recommend a ballot proposal to the Board of Education, map out a campaign plan and theme, and become the Campaign Committee.

In the "Identify Supporters" phase, the scene is first set through a campaign kickoff event which both announces the proposal and establishes broad based support. All members of the coalition participate in efforts to make their support known -- both publicly and within their memberships. The event should be a public demonstration of unity in which all groups participate. This activity should be well attended, a basis for positive media coverage, and an opportunity to raise money for the campaign.

Speaking engagements are solicited, the media asked for endorsements, and other efforts made to let people know how important it is to vote for the millage proposition -- to persuade them. Voter registration activities are also underway -- mindful of legal deadlines for registration efforts.

In the 4th and 3rd week before election day, canvassing to identify supporters on a one to one basis is conducted. This sets the stage for knowing who to turn out at the polls in order to win.

"Turning Out Supporters" is the final phase. An all out effort to identify and persuade must now be rewarded by making sure supporters turn out to vote. Challengers and other election day workers must be identified and trained, phone banks organized, absentee voters contacted, reminder calls made, and the victory party planned.

Election day is the hardest working day of the campaign. Supporters who have not voted by mid-afternoon must be contacted, up to 4 or 5 times if necessary, to impress on them the importance and the urgency of getting to the polls.

After the election, "thank you" cards, a debriefing and file updating will conclude this final phase.

As you can see, up to a year is required to run a comprehensive campaign. Allocate sufficient time to implement each activity properly. Do it right the first time -- and win.

Organize Steering Committee

Coordinating various aspects of the campaign is important -- and you will want to recruit some good help. A steering committee of 11 is suggested:

1. Campaign Director.
2. Organization Liaison Coordinator.
3. File Coordinator.
4. Survey Coordinator
5. Canvass Coordinator.
6. Election Day Coordinator.
7. Phone Bank Coordinator.
8. Voter Registration and Absent Voter Coordinator.
9. Media and Printed Materials.
10. Campaign Services Coordinator.
11. Fundraising Coordinator.

Section 3 of this manual deals with "Getting Organized" and looks at each of these areas of responsibility, suggests job descriptions, and refers to sources of information each will find useful in completing their tasks.

Gather Information And Get Help

Read this manual carefully. It contains proven approaches for your campaign. Every suggestion has been tested and perfected in election situations. It may be possible for you to cut some corners, but leaving out key elements substantially reduces the impact of other elements. Each element is designed to work together. Winning is hard work.

You should try to attend some of the workshops which are sponsored by various groups specifically to assist local committees faced with election campaigns. Take a team of people which includes citizens, school employees, administrators, board members, and students. If possible, arrange for your entire steering committee to participate in at least one workshop. These workshops will give you additional ideas as well as provide an opportunity for you to ask questions of "experts" who have been through numerous campaigns. They can help you to anticipate problems and to examine alternate ways of addressing them.

Professional consultants can also be of special help with some of the important campaign activities. A consultant can not only assist your coalition reach consensus on a campaign plan -- but can also counsel each of your campaign coordinators on their roles. Surveying and materials development are examples of other activities in which a consultant can be extremely helpful. You might want to simply invite someone to participate in your campaign meetings and offer suggestions which might be appropriate. However you choose to involve consultants, you will usually find that they will be able to look at your campaign from a different point of view and offer valuable ideas. Please note that consultant fees should be paid by the campaign committee. No public funds should be used for this purpose.

Summary

The several components of a campaign have been been briefly noted and some suggestions offered on where to begin the important task of organizing a campaign. Succeeding sections will examine each aspect of the campaign in detail.

First,

Some Basics

Elections involving ballot questions are not the same as candidate elections. Many things which apply to candidate races do not apply, in the same way, to ballot issues. In addition, there are some very unique things about schools, school people, and school-community relations which make school millage election strategies different. This section is devoted to concepts which form the basis for the suggestions and recommendations in this manual for achieving success in school millage elections.

The School Family Is A Strong Coalition

In most situations, one supportive vote from each family which has children in school would pass a ballot proposal. In a number of situations, school employees and their families could carry an election. The reason for this is that school elections are generally low turnout elections. When parents, teachers, students, administrators, board members, custodians, booster groups, PTA, and the other groups which are closely tied to the schools come together, they constitute a very strong coalition. When the public school community works cooperatively, it is an extremely potent force and most goals can be realized.

Some Voters Believe Their Vote Isn't Important

There are many reasons why people don't vote, but the predominate reason is that they don't think their vote will really make a difference. It is the reason many school supporters don't show up at the polls. Considerable effort must be devoted to understanding the motivations of the non-voters among your supporters -- and a lot of hard work must go into changing this behavior. To overcome apathy among school supporters, strategies will be needed to create an urgency in their minds and a belief that their vote can make the difference. The use of Challengers at the polls is the strategy utilized to identify non-voting supporters and to remind them that their vote is needed on election day.

School Employees Are Reluctant To Get Involved

While this is changing gradually, school workers have been told for years that they should not be involved in school elections or politics of any kind. They are told for instance that people will only think an employee is trying to "save their job", or "line their pockets" if they become involved in a school tax

issue.

While some people do voice these complaints, most people are anxious to have school employees as partners in the campaign. A cooperative working relationship is what education is all about. A person will have difficulty getting excited about the election if their friend who works for the school isn't interested enough to be involved. It will be difficult to overcome years of being told to "stay out", but employees are essential partners in the "school family".

School Employees Are Powerful Communicators

Most people will tell you they get their information about schools from the newspaper. However, there is another, informal communication system at work which is very effective. It is the communication network between the community and school employees. It is powerful. In typical school districts, various surveys indicate 40% to 60% of the public has a personal friend who works for the schools. It is this friendship that serves as the basis for communicating information about schools.

When school employees set out to convey a message to the community, they can do so within a week to 10 days. The basis of this ability is that most school employees are trusted and believed when they talk about education. Because communication is so important in an election, groups have usually found that school employees are an important part of a coalition effort.

Major Conflicts Must Be Resolved

Significant conflicts within the "school family" need to be resolved before the family will work together effectively. Normal and expected differences can be accomodated, but not bitter grievances or acrimonious disputes.

A neutral person is very often needed to help resolve these difficulties. Sometimes a professional mediator is available, but a parent or other community member can also help facilitate communication and cause various groups or individuals to look at the issues from a new perspective -- and bring about resolution.

When these conflicts are resolved, there should be a public demonstration (such as a signing ceremony,

complete with smiles and handshakes) as a means of bringing some finality to the conflict in the public's mind as well as the parties involved. Too often a problem is solved but bad feelings linger on because individuals are not somehow involved in, or a witness to, a formal conclusion of hostilities.

Gain Consensus On The Proposal

Whenever possible, decide how much to ask or how the ballot proposal is to be "packaged" only after the election coalition has agreed on a proposal recommendation. Too often these decisions are made -- and then groups are asked to lend their support. Success depends to a large degree on whether the groups which must be supportive believe that the proposal is their proposal.

This is not an easy process and might require substantial negotiation between the various groups -- but it is a highly effective way to obtain commitment. The fundamental concept to highlight is that a group might not like everything that will go into the package, but each group will have to support the entire recommendation in order to have their particular concern included. In this way, the band boosters can get some relief from their massive fundraising demands -- but only if they are willing to work with the PTA at Washington school where they want to reinstate the elementary counselor position. As you can see, this kind of discussion, compromise and agreement will require patience. At the same time, when a recommendation is agreed upon, all the participating groups will be highly committed because their self-interests are included.

While there may be exceptions, this process will almost always lead to one proposal. To place a variety of issues before voters is to permit each of the interest groups to work toward the issue(s) of interest to them while ignoring the concerns of others. The result of this is too often the defeat of several or all proposals.

The Campaign Which Is "First" Has A Big Advantage

The Campaign which is "first" to set the tone, define the issues, and shape the direction of the election has a distinct advantage. Many endorsements for instance, are determined by which group was first in asking for support. Another bonus to being "first" is

that others are almost always forced into a reactive posture -- which only further cements the campaign's position. Consistent with this concept, the campaign shouldn't wait for the media to come to it -- be on their doorstep before anyone else.

This doesn't mean that everything is done "first". Canvassing, for instance, should not be done more than three to four weeks before the election. But, when in doubt, be first.

Avoid Reaction

Reacting is a defensive strategy and usually works to the advantage of opponents. They will have forced the campaign to re-focus and react to issues which reduce the odds of winning on election day.

Smear tactics, unfounded criticism, and false information by opponents can be very difficult to handle. There is always a lot of pressure to react -- and this pressure must be resisted. Supporters will want you to respond to false accusations and to reply to negative letters to the editor. Responding directly to opponents, however, is almost always a losing proposition. Learn to deflect attacks and re-focus attention on your campaign theme. See if you can make a positive out of a negative. Stay on the high ground. Try something like "It's too bad that some people are involved in name calling. We must all remember that the real issue in this election is ...(turn to your theme)". You must make your issue the issue in the campaign.

Talk About Concerns People Understand

Most campaigns get bogged down by campaign literature and presentations based on a lot of facts and figures. This is a mistake. People generally do not understand the complexities of school finance or property taxes or tax value versus market value. If the campaign becomes focused on tax rates, tax credits, state school aid formulas, and comparative tax rates, many voters will only be confused and not convinced.

Most voters make their decisions based on very simple (and usually emotional) issues. When they go into the voting booth, they will be thinking about their child's educational needs -- or whatever is most important to them. The campaign's appeal should almost always be based on children, on pride, on the

importance of education, on how good schools attract business, on how good schools are essential to maintaining property values, or on some other issue which has a simple, understandable, emotional appeal. NOTE: Some select audiences will require more detailed financial information and the campaign committee should be prepared to respond to this need.

Many people in your campaign will want to "educate" the voters on the financial problems faced by the schools, the budget detail which shows how real the need is, or how little this will really cost when you figure out all the tax credits. While it may be possible to do some educating, focusing campaign literature and presentations in this direction will only work with a very small percentage of the voters. For the vast majority, you must simplify and emotionalize the issue -- and you must interpret it to them in terms of their own self interest and the needs of the community's children.

Taxes

Not many people like paying taxes. They vote for taxes becaue of a service they will receive or because some other benefit will accrue to them. Groups trying to expand school program offerings will find that it will be helpful to concentrate on the benefits to be received rather than to dwell on discussions of taxes. Emphasize the need for education to land good jobs, to keep accreditation, or assure the parent that their child won't be in an overcrowded classroom when the proposal is passed. It may be possible to translate education programs into saving money. For instance, school transportation is much less expensive when the school provides it using taxes than it would be for everyone to provide their own.

Advertising Has Limited Value

One important difference between candidate races and issue campaigns is the matter of name recognition. To a candidate, attaining name recognition is one of the most important goals. However, in school millage elections, it is usually best to avoid yard signs, stickers in windows, bumper stickers, newspaper or broadcast media advertising. Concentrate instead on face-to-face contact with likely supporters through phone banks, small group meetings, or other means of talking with individuals. If there is to be media coverage of some sort, it would be best early in the

campaign when people are making their decision, not later when all it does is remind both supporters and opponents about the election.

Use Simple Repetitive Messages

You must reduce your campaign into a simple theme (usually not more than five words) which simplifies the issue in a way that is understandable and that people can support. It must be broad enough so that people will have difficulty disagreeing with it. For example, "We Care About Kids" has virtually universal appeal, while "We Care About Band" attracts a much more limited audience. Stick with your theme -- and repeat it at every opportunity. Changing the theme in mid-course will create confusion among voters and reduce chances of winning.

Develop Short Answers And Explanations

Education is a very complex matter. Simple answers often do difficult questions an injustice. Nevertheless, most people want these matters simplified for them. Work hard to accommodate this need.

Develop one sentence statements on the major concerns you know will be faced in the campaign. For example, the question "How will this affect my taxes?" can be answered "The typical taxpayer will pay an increase equal to the cost of one bottle of pop a week." Don't spend time trying to explain how Equalized Valuation, income tax brackets and amount of income must all be known in order to compute how this will affect their tax bill. Most of this will be incomprehensible to the person who asked the question -- and the rest of the audience will fall asleep in the meantime.

Here are some more examples of how complex questions can be answered:

Q How did we get in this mess anyway?
A Our state and federal aid has been reduced by 20 percent.

Q With all the folks out of work, how can we afford an increase in taxes?
A If you're out of work, you will be paying less in taxes than when you were working.

Q Haven't we lost students? Why should schools cost more?
A When your oldest child goes off on their own,

you have one fewer child at home -- but the electric bill, gas bill, and other costs keep going up. We have some savings, but most of our costs keep going up -- just like yours.

Spend quite a bit of time working on answers that are brief and at the same time responsive to the vast majority of situations which will be faced. Keep it short and simple.

This manual is not suggesting that millage campaign information be evasive or deceptive to the many questions and concerns citizens have in regard to taxes and school finance. On the contrary, much more information is needed by all voters. However, the voter receives a vast amount of information every day from a variety of sources i.e. radio, TV, newspapers, friends, hearsay, the workplace, etc. The campaign message, if it is to compete on an equal footing must be short, simple, accurate, and to the point. Otherwise it will be rejected, or worse, never received at all.

Speak Out For Education

It is very important to become cheerleaders for good schools. Too often the only voices heard are those who complain about schools and/or taxes. Many school people feel they are under constant attack. National reports of educational shortcomings, negative media attention, and local complainers seem to dominate the airwaves. Seldom does anyone stand up and say what a great job is being done in the schools. One reason for this is that people who are dissatisfied are highly motivated to speak out while people who are generally satisfied have no reason to become vocal.

Unfortunately, the chronic complainers carry on their accusations, name calling, and distortions virtually unchallenged. Certainly there is room for improvement. No one wants to improve education more than those who are closest to the schools. Still, the fact is that our schools have never educated such a high percentage of the population to such a high level of achievement.

Many would voice their support of education -- if they only knew how to counter the propaganda techniques of negative groups. What must be done is to give them good role models. Begin speaking out.

Handling the negative person is best done in two steps -- both almost within the same breath. First you must disarm the attacker and then turn to your theme. Here are some examples:

* "We certainly don't want to become involved in a name calling contest at a time when all of us must devote our efforts to making sure our children get a good education."
* "You have a legitimate concern and we will need to address that issue -- but right now the priority must be to make sure our school doesn't lose its accreditation."
* "If someone will organize a group to work on that problem, I will be the first to join -- but this committee's priority is to make sure our schools are able to offer a basic educational program next year."
* "I haven't heard that rumor yet. Of course, that only points out the importance of recognizing that good education takes teamwork. We've got to work together to end rumors and tell people the story of what good schools mean to our community."
* "Everyone seems to agree that the tax system needs to be changed -- but no one has been able to find a better way that everyone can agree on. Meanwhile, we do know that good schools are essential if we're going to attract business to our community -- business that will help each of us by sharing the cost of taxes."
* "I'd like to have you spend a few minutes with me and a tax expert after the meeting. As a senior citizen this proposal shouldn't increase your taxes one dime because of special tax credits -- unless your income is very high. Meanwhile, I'm sure we all agree that our children must have a good basic education..."

Several important concepts are provided in these examples of how to handle the negative person. First, do not get angry. The person must be treated politely, and without harshness. You are in control. Stay in control. The audience will quickly move to support an underdog -- don't give them a reason to switch their allegiance.

Second, stay on the high ground. The campaign cause is a worthy one and the theme must be constantly reinforced.

Third, care about the other person. Be sympathetic with their concern or problem where possible -- but don't dwell on it. Make a quick transition to your issue.

Fourth, don't try to debate. Avoid getting into a discussion of opponent's issues. Work to establish your theme as the issue in the campaign. If time is spent responding to the negative person's agenda, you have conceded that their issue is the issue.

Communication Problems

On one side in your campaign are the avid supporters. You will have to do something really terrible to turn them against you. On the other side are those who are diehard opponents. You cannot expect to have any success changing them either.

The campaign must attract the large group of undecided voters which usually determines the outcome of the election. The trouble is that you and your supporters understand very well the concerns and arguments of those at the extremes -- because those are the circles you hear from all the time -- but you don't really know or hear much about the group in the middle. The issues which appeal to you and your supporters may well fall on deaf ears when you try to attract interest from the undecideds. This is one of the reasons why a survey of public attitudes is so important. You must not only know what will motivate undecided voters -- you must have persuasive rationale to give your hard core supporters for packaging the campaign in ways that may be foreign to them.

Diehard Voters Can't Be Converted

The diehard opponent can be spotted easily because they always attack you at what they perceive as your weakest point. And, if you have a response to that attack, they will immediately attack another perceived weakness. Realize that this type of voter cannot be converted. Spend as little time with opponents as possible. Be polite to them, but turn to more productive pastures as soon as possible.

The avid supporter is likewise committed. The campaign will have to work hard to alienate this person. In the campaign, early energies need to go toward solidifying these supporters -- then turn attention toward persuading undecided voters.

You Don't Need Everyone

You need enough votes to win -- not everyone's vote. Look to see what kind of support you can muster from persons who are frequent voters or who are in groups favorable to your cause and can be persuaded to vote. If you do the job of capturing the issue, identifying supporters, and getting those supporters to the polls -- you are on the winning track.

You Can Neutralize Some Opposition Voters

By packaging your campaign and capturing the issue properly, many persons who would otherwise be opponents will stay at home because they are having difficulty either supporting or opposing you. This reinforces the importance of creating a campaign theme which will appeal to the broadest possible audience without becoming involved in specific details which would turn one group or the other against your campaign. If, for instance, you can "sell" your point of view with a theme such as "We care about Sandy Pointe Kids", many persons who don't want to pay higher taxes will nevertheless stay home because they also "care about kids".

Having All The Answers Is Not Always Desirable

Many people will press such questions as "what programs would be cut if the issue is not successful?" Sometimes however, trying to forecast the future and provide specific answers to these questions works to your disadvantage. The uncertainty of how each group might be impacted is an important ingredient in their participation. If one group knows it won't be affected either way by the outcome, their interest in working in the campaign is substantially reduced. And, it is not really necessary to have answers to all questions. It is certainly reasonable to say "We'll have to look at that question if the time comes. Right now we're all going to work hard to make sure ...(turn here to the campaign theme)."

On the other hand, it is important to be open and honest. Don't try to cover up something or to avoid tough issues that do need to be addressed.

Treat The Media As A Friend

Too often media representatives have been ignored --

not only during the campaign, but on a continuing basis. Educators tend to think that the media are fundamentally hostile and not to be trusted when the opposite is usually the case. Develop a sense of how to present everyday activities in ways that will be very appealing to the media. Much work must go into re-examining views of the media, developing a working relationship and understanding what motivates media interest and coverage.

Getting Organized

This section will discuss three major organizational activities: establishing an election headquarters, recruiting people to fill key leadership roles in the campaign and conducting an analysis of how many votes you will need to win.

Campaign Headquarters

The campaign needs a headquarters. It might be in someone's basement, a storefront, or a room which is temporarily unused. It doesn't need to be fancy -- but you will need to have:

* A location where people feel safe.
* Telephones (Headquarters needs only one or two phones, but a phone bank will be necessary for many activities. Consideration should be given to the possibility of putting the phone bank into the headquarters if room is available).
* Clean restrooms.
* Sufficient parking.
* An ability to secure materials and equipment.
* Space to hold small meetings.
* Electrical outlets for a typewriter, computer, printer, duplicating equipment, coffee pot, or any other equipment you anticipate using.
* Sufficient desks, chairs, shelves and other furniture.
* Pencil sharpener, three hole punch, stapler, and other office equipment items normally used in processing paperwork.

Get some charts on the wall. Post newspaper clippings. Display the campaign theme on a big sign as soon as one is set. Make it look like a well organized campaign -- and a place people want to be.

Personnel

Now the people end of things.

CO-CHAIRPERSONS

Co-Chairpersons for the citizen's campaign committee should be citizens whose opinions are respected, have the ability to meet with groups and are persuasive. The co-chairpersons have the following responsibilities:

* Chair meetings of the Campaign Committee.
* Coordinate the formulation of the Citizen's Committee recommendation to the Board concerning a ballot proposal.

* Maintain the campaign coalition.
* Handle major speaking engagements and seek endorsements from key groups.
* Meet with editors, news directors, and other media representatives to explain the proposal and ask for their endorsement.

An early campaign meeting to get a master plan laid out is very helpful. The co-chairpersons will undoubtedly chair and facilitate such a meeting.

CAMPAIGN DIRECTOR

While the Co-Chairpersons have overall responsibility for the campaign -- and particularly for leadership in the Citizen's Campaign Committee, the Campaign Director has day to day responsibility for campaign activities. The Campaign Director will usually work with a small steering committee which includes the coordinators of all key campaign components. In addition, the Campaign Director will be responsible for:

* Recruiting and briefing key campaign leaders on their role and assignments.
* Overseeing the development of a campaign theme and plan.
* Motivating volunteers and creating interest in the campaign.
* Monitoring campaign activities and working with coordinators to assure the campaign plan is implemented.

FILE COORDINATOR

This is one of the most important responsibilities in the campaign because the filing system serves as the basis for virtually every activity. For example, it provides a means of identifying those who should be the target of voter registration activity, samples for public opinion surveys can be pulled from the "File", and canvassing efforts are assisted by drawing a prioritized list to be contacted. As election day approaches, the list of supporters developed during canvassing becomes the focus of our get-out-the-vote effort. Such a list is maintained in the "File".

The person responsible for file management will be in charge of building and maintaining a comprehensive file as well as working with the various other campaign leaders as they fulfill their roles. The job includes:

* Developing a computer or other filing system of information on voters and prospective voters.
* Preparing a sample and alternates for surveys.
* Preparing a priority list of non-registered but likely supporters for the registration committee.
* Enter data on newly registered voters.
* Prepare a priority list for canvassers (must be walking lists if door-to-door canvass is undertaken).
* Enter data on identified supporters from canvass reports.
* Prepare alphabetized list for each precinct of identified supporters for pre-election reminder calls and for election day get out the vote efforts.
* Follow up after the election to record which persons voted.
* Keep a record of persons who worked as volunteers and who made financial contributions to the campaign.
* Be prepared to provide mailing lists for targeted mailings.

SURVEY COORDINATOR

At least one survey should be completed as part of the campaign. This should come before key decisions are made -- such as determining the amount of the issue and how it will be packaged. A survey can help in determining what is saleable to various voting groups, issues in the campaign, how voting blocks might be persuaded to be supportive, and other important concerns in packaging the issue and formulating a campaign plan. This job will entail:

* Development of a survey instrument.
* Working with the file manager to pull a sample.
* Preparing the "call sheets" (persons to be called during the survey).
* Arranging for survey data to be compiled, analyzed, and reported.
* Developing other information and statistics which may be needed as key campaign decisions are made.
* Prepare kit for survey interviewers and work with phone bank coordinator to train interviewers.

CANVASS COORDINATOR

The canvass is a one-to-one effort to persuade voters

and to develop a comprehensive list of supporters. This list will form the basis of election day activities aimed at turning out supporters. Canvass activity should take place beginning in the 4th and 3rd week before the election. Usually this will be done using phone banks, but door-to-door and other approaches might also be utilized. The Canvass Coordinator will:

* Work with the File Coordinator to develop a list of persons to canvass which is prioritized to emphasize contacts with those persons most likely to be supportive.
* Plan and oversee the canvass effort.
* Prepare kit for canvass volunteers
* Work with the phone bank coordinator in training efforts.

PHONE BANK COORDINATOR

Phone banks are used in practically every phase of the campaign. Surveys, canvassing, and get-out-the-vote activities are all done via phone banks. Even when door-to-door canvassing is undertaken, phone follow-up is almost always necessary. The Phone Bank Coordinator will be responsible for:

* Identifying locations for phone banks.
* Recruiting volunteers as needed.
* Working with the survey/canvass coordinator to train volunteers.
* Making sure volunteers in phone banks are properly supervised.

VOTER REGISTRATION AND ABSENT VOTER COORDINATOR

Since our supporters must be registered in order to vote, it is very important to assure that persons who are supporters are registered.

After the deadline has passed for registration, attention can be turned to following up on persons who will be out of town on election day and arranging for absentee voting (recent graduates who are now away at college, for instance). In addition, as applications are processed and mailed by election officials, this person is responsible for seeing that the absent voter receives one final urging for a supportive vote. This job will entail:

* Identifying voter registration deadlines and procedures which must be followed in a registration effort.
* Working with the file management coordinator to

identify likely supporters who are not registered.

* Arranging for registrars to be deputized if necessary.
* Develop and implement a plan to contact and register as many likely supporters as possible.
* Develop and implement a plan for contacting recent graduates and other highly likely supporters who will be out of town on election day and arranging absentee voting.
* Follow-up with persons who are mailed absentee ballots with a request for their support.

ELECTION DAY COORDINATOR

Election day is the most important day of the campaign. There are no second chances. Either everything comes off as planned or you lose. Three major activities are key to election day success: challengers at the polls so you know which of your supporters have voted or not voted; callers to contact those who haven't voted; and other resources which may be needed such as sitters, drivers, and runners. Job responsibilities are:

* Obtain information on requirements which must be met for challengers and follow through on any paperwork which may be necessary.
* Recruit volunteers to serve as challengers.
* Develop a kit for challengers and other election day workers.
* Run a training session for challengers and all other election day volunteers.
* Work with the Phone Bank Coordinator to assure sufficient phones and volunteer phoners will be available -- for pre-election reminder calls and on election day.
* Coordinate all election day activities.

MEDIA AND PRINTED MATERIALS COORDINATOR

Media can be very important to a campaign. By working closely with media representatives it is usually possible to convey a broad base of support for the proposition, and gain editorial support. You will also try to make your theme the campaign issue.

In addition, campaigns require much in the way of materials. Brochures, flyers, kits, and background data must be developed, printed and distributed. In addition to mailings to targeted groups, follow-up letters to persons contacted through canvassing activ-

ities will be important.

The person in this role must have good communication skills, be creative, understand that voters do not respond well to a display of many facts and figures, know how to lay out attractive printed materials and -- understand and utilize the capabilities of modern word processing equipment. Major tasks will include:

* Developing a positive personal relationship with all media representatives, editors, and news directors.
* Obtaining media coverage of campaign events which point out broad support and emphasizes the campaign theme.
* Working with Co-Chairpersons in seeking editorial support.
* Preparing materials and releases to assist the media in covering the campaign.
* Developing a brochure to be used as the main piece of campaign literature.
* Preparing a fact sheet for distribution to volunteers and voters who need more in-depth information.
* Assisting other campaign leaders in developing and printing kits for survey interviewers, challengers, canvassers, callers, and others.
* Arranging for word processing capability and supervising development of boiler plate paragraphs which will be utilized in putting together personalized letters and letters to targeted groups.
* Following up with groups which have supported the issue to arrange appropriate notices to their membership which encourage supportive votes.
* Supervising day to day word processing activities.

CAMPAIGN SERVICES COORDINATOR

Just as an army travels on its stomach, your campaign will need a highly organized person to make sure that any group activity has all the makings of a good time in addition to hard work. Volunteers often need special transportation, child care or other assistance. In addition, election day drivers, runners and child care services will be needed. Major activities to be coordinated by this person will include:

* Victory party.
* Refreshments for all group activities.
* Child care arrangements for campaign

volunteers.
* Transportation for campaign volunteers.
* Working with the Election Day Coordinator to provide drivers, runners, child care and other services which may be needed on election day.
* Other special needs.

FUNDRAISING COORDINATOR

Every campaign needs money, and someone must maintain financial records as well as file any legal documents related to public disclosure of campaign receipts and expenditures. The person selected needs to have the capability to obtain initial funds from a selected group within the community who will make contributions of at least $25 and to supervise fundraising events and activities where smaller contributions will be solicited. The Fundraising Coordinator will also need to follow through with organizations which have indicated their support to also obtain financial contributions. Tasks include:

* Developing a campaign budget.
* Supervising fundraising activities.
* Maintaining financial records.
* Handling any reporting requirements required by law.
* Follow up with endorsing groups to obtain a financial contribution.
* Possess the personality where asking for money is not difficult.

ORGANIZATION LIAISON COORDINATOR

A complete list of community organizations, clubs, unions, and other organized groups needs to be developed. Such a list is then prioritized and leadership contacts made. Meetings with the group or with the group's leadership are sought for the purpose of discussing the election. Koffee Klatches are organized, if appropriate.

A brief campaign speech will be made which includes a request for an endorsement from the group. If the group does endorse, they should be asked to contact all members to publicize and explain the endorsement. In addition, every group should be asked to make a financial contribution, help with volunteers, and to remind all members of the endorsement again just prior to the election. Responsibilities of this Coordinator include:

* Developing and prioritizing a list of community groups.
* Contacting each group (in priority order) to seek an opportunity to discuss the election.
* Arranging for someone to represent the Campaign Committee before the group (usually a Co-Chairperson).
* Developing a speakers bureau to handle meetings the Co-Chairpersons won't be able to make.
* Working with the Fundraising Coordinator and the Materials/Mailings Coordinator to follow-up on endorsements.
* Identifying persons within various groups who will assume leadership at an appropriate time to move for endorsement, publicizing the endorsement and authorizing a financial contribution.

Analyze Your Situation

With a place to throw your hat and key coordinators on board, turn to determining exactly where you are. An early Steering Committee meeting should be devoted to careful study of your status with respect to a number of concerns.

APPENDIX Q contains a "Pre-Election Evaluation Guide" designed specifically for this purpose. Careful attention to assessing your strengths, weaknesses and other factors which must be considered in formulating a solid campaign is a vital organizational step.

Analyze Support Votes Needed

On election day, you must end up with more votes than do your opponents in order to win. Knowing how many supportive votes must be identified in order to assure victory is therefore very important. Here are some quidelines to help you establish a goal for the number of supporters to have "in the bank" on election day:

* Analyze past elections and determine the largest number of "NO" votes which have been cast. You will probably need at least this many to pass a proposition.
* Increase this number by a "comfort margin". There is no magic formula for establishing this margin, but some considerations will include the rate of unemployment, whether there is organized opposition, and events (such as a school closing) which might have triggered strong feelings toward the schools within the community.

* If you have experience with identifying supportive voters and with aggressive election day efforts to turn out your supporters, compute the proportion of identified supporters who did not vote. Now, increase the number of votes you need to identify -- allowing for what you consider a "normal" election day fall off. If you have no experience to draw on, anticipate that about 35% of those you identify as supporters will not turn out on election day -- and increase your estimate of supportive voters to be identified accordingly. (See Figure 3 - 1)

Figure 3 - 1
Supportive Voters To Identify

1. Most "NO" votes cast in recent elections _____
2. Additional votes needed for "comfort margin" _____
3. Projected votes needed to win (Add 1 and 2) _____
4. Percent of identified supportive voters who will not turn out (express as decimal ie. 38% = .38) _____
5. Number of support voters you need to identify (multiply 3 by 4 and add the product to 3) _____

Role Of The Board And Staff

In most cases, the Board and staff need to be actively involved in the campaign. An exception to this would be when involvement would clearly be a negative to the campaign. Most often however, failure to participate creates a problem because others then sense the effort is not important.

Board representatives should serve on the Needs Com-

mittee and on the Campaign Committee as should persons from the various staff groups. It is not unusual for half or more of the Steering Committee to be drawn from these groups.

Citizen involvement tends to attract new persons to each campaign. School staff can usually provide continuity and have immediate access to communication channels and other resources. Because of this, staff often need to play major support roles while citizens are in leadership positions.

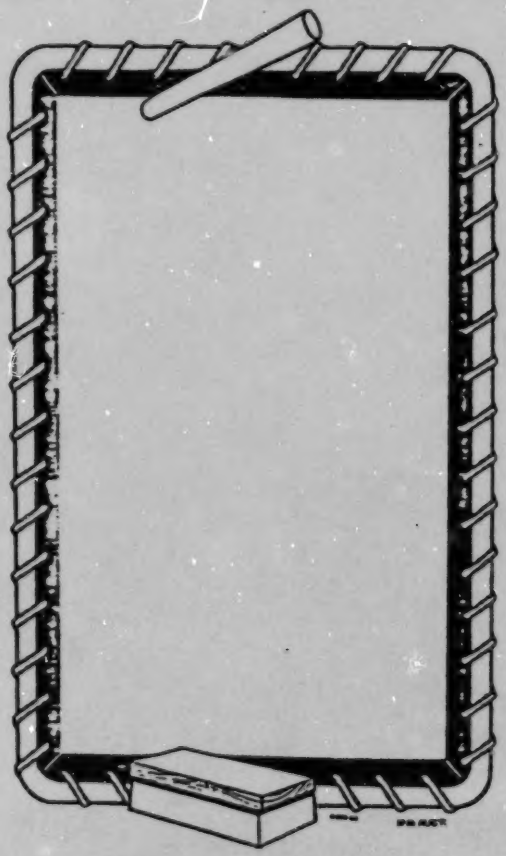
Organizational Patterns

While the basic organizational pattern suggested focuses on a Steering Committee, some campaign activities may require a more involved structure. Literature Drops or Voter Registration for instance, might successfully be structured along elementary school attendance boundary lines. Carefully evaluate however the advantages and disadvantages of substructures before implementing them. Even in very large districts, there is a great advantage to centralizing phone banks, district wide door to door efforts and other activities. Each time responsibilities are divided, supervision and control of the overall quality snd quantity of activity is made more difficult as is the ability to reallocate resources when needed.

Summary

This Section has concentrated on various aspects of getting the campaign organized. Specific information on many tasks is contained in subsequent pages, and Coordinators should be given access to those Sections as well as the Appendices which relate to their roles. In addition, all key campaign personnel should review early sections of this book so that everyone understands the overall approach and how various roles and activities complement each other.

Calendar For The Campaign



Ideally, a campaign is viewed as an effort that continues year-round. The next campaign begins as soon as this one is over. On-going campaign activities are those in which communication channels are maintained, community relations improved, coalitions expanded and healthy attitudes of working together sustained through projects which benefit the schools and the community. At least six months to a year is required to plan and run a solid campaign -- particularly when school and community groups are to be involved in looking at educational needs in order to establish a broad base of support for the election issue.

START NOW. Determine how much time you have available and build the best possible campaign which can be implemented between now and election day. If you have six months to a year, a comprehensive campaign can be carried out. With less time however, DO ONLY THOSE THINGS THAT CAN BE DONE WELL. Compress the schedule into the time available -- eliminating tasks which cannot be properly and fully carried out and directing resources toward those activities which have highest priority.

You might find it useful when planning your calendar, to begin with election day and plan backward. Also, as a rule of thumb, three days of planning are generally necessary to make sure one day of activity comes off correctly. Remember also that there are usually statutory deadlines regarding filing of documents which will dictate specific time parameters.

The following time table is based on having sufficient time to run a comprehensive campaign. (If you have less time, consult the calendar which appears in APPENDIX P.)

Campaign Organization Timetable:	--- Weeks Before Election --- 52	24	20	16	14	12	11	10	9	8
Identify Manager	x	x								
Identify Coordinators	x	x								
Pre-Election Evaluation	x	x								
Training Workshops	x	x	x	x						
Review Materials	x	x								
Open Office	x	x								
Voter File Developed/ Updated	x	x	x							
Tentative Campaign Plan		x	x	x	x					
List Coalition Groups			x							
Set First Coalition Mtg.				x						

Campaign Organization (Continued)	--- Weeks Before Election ---									
	52	24	20	16	14	12	11	10	9	8
Contact Groups Re Mtg.				x	x					
Hold First Coalition Mtg.						x				
Coalition Recommends Millage								x		
Board Approves Ballot Question								x		
Coalition Finalizes Theme									x	
Coalition Finalizes Plan									x	

Needs Assessment Timetable:	--- Weeks Before Election ---									
	52	48	44	40	36	32	28	24	20	16
Identify School/Community Groups	x	x								
Make Personal Contacts To Ask Involvement			x							
Send Invitation Letters			x							
Prepare Background Data		x	x							
1st Meeting of Needs Committee				x						
Meetings				x	x	x	x	x	x	x
Needs Committee Report										x

Written Materials Timetable:	--- Weeks Before Election ---									
	52	24	16	8	6	4	3	2	1	0
On-Going Communication	x	x								
Brochure				x						
Fact Sheet				x						
Flyers				x						
Targeted Mailings					x	x	x	x	x	
Newsletters					x	x		x		
Canvass Follow-up						x	x	x	x	

Pre-Election Survey Timetable:	--- Weeks Before Election ---									
	16	15	14	13	12	11	10	9	8	7
Design Instrument		x								
Arrange Data Processing		x								
Consult Data Processing on Layout			x							
Arrange Phone Banks			x							
Identify Interviewers			x							
Pull Sample			x							
Prepare Interviewer Kit			x							
Finalize Instrument				x						
Print Materials				x						
Train Interviewers				x						
Conduct Interviews					x					
Process and Analyze Results						x				
Prepare Report							x			
Report Results								x		

Pre-Election Survey (Continued)	--- Weeks Before Election ---									
	16	15	14	13	12	11	10	9	8	7
Review Results for Voter Registration								x		
Review Results for Canvass								x		
Review Results for Election Day Get Out Our Vote								x		

Fund-Raising Timetable:	--- Weeks Before Election ---									
	16	14	12	10	8	6	4	2	0	-
Legal Requirements	?	?	?	?	?	?	?	?	?	?
Large Contributions	x	x								
Prepare Fundraising Kits			x	x	x					
Recruit Fundraisers			x	x	x					
Complete Fundraising Plan					x					
Campaign Kickoff Event						x				
Fundraising Events							x	x		

Campaign Kickoff Event Timetable:	--- Weeks Before Election ---									
	12	11	10	9	8	7	6	5	4	3
Decide Event				x						
Plan Event				x						
Set Location				x						
Make Arrangements				x	x	x	x			
Send Out Invitations					x					
Personal Contact Reminders							x	x		
Media Advised							x			
Hold Event								x		

Canvass Timetable:	--- Weeks Before Election ---									
	9	8	7	6	5	4	3	2	1	0
Decide Type of Canvass		x								
Prepare Canvass Kits			x	x						
Prepare Walking Lists				x	x					
Prepare Phone Lists				x	x					
Word Processing For Follow-up				x	x					
Print and Compile Kits					x	x				
Arrange Phone Banks					x					
Line Up Canvass Volunteers					x	x				
Line Up Follow-up Volunteers					x	x				
Hold Training Session(s)						x				
Conduct Canvass							x	x		
Follow-up Q Slips							x	x	x	
Follow-up Letters							x	x		
Follow-up Undecideds							x	x	x	
Access Canvass Data Into "File"							x	x	x	

Election Day Timetable:	--- Weeks Before Election --- 9	8	7	6	5	4	3	2	1	0
Prepare Challenger Kit					x	x				
Challenger Legal Documents	?	?	?	?	?	?	?	?	?	?
Identify Challengers					x	x	x			
Prepare Other Kits					x	x				
Identify Other Workers					x	x	x			
Print and Compile Kits							x	x		
Hold Training Session									x	
Arrange Phone Banks							x	x		
Victory Party Arrangements								x	x	x
Print Lists For Reminder Call									x	
Reminder Call										x
Print Lists For Election Day										x
Victory Party Invitations									x	x
Election Day										x
Victory Party										x

Organization Liaison Timetable:	--- Weeks Before Election --- 8	7	6	5	4	3	2	1	0	-
Meet To Explain Proposal, Seek Endorsement, and Ask For Volunteers/ Contributions	x	x	x	x	x					
Endorsement Letters to Members		x	x	x	x	x				
Reminder Letter								x		
Invite to Victory Party								x		
Send Thank You Notes										x

Post Election Activities Timetable:	--- Weeks After Election --- 0	1	2	3	4	8	12	16	20	24
Thank You Notes		x								
Debriefing Meeting			x							
Legal Filings		?	?	?	?	?	?	?	?	?
File Update With Election Data					x					
Follow-up On Recommendations From Debriefing				x	x	x	x	x	x	x

Committees and Meetings

Clarity of role and responsibilities between the Needs Committee, the Campaign Committee and the Steering Committee will help assure a smooth running campaign. This relationship is delicate because the Steering Committee should be in effect before the Campaign Committee is formed -- but must make a transition to becoming a part of the Campaign Committee. This Section will examine the functioning of both committees, how to conduct the very important Campaign Planning Meeting and how meetings of any campaign group can be made more efficient.

The Steering Committee

Most of the day-to-day campaign activities are coordinated by a small group -- the Steering Committee. This group is made up of the Co-Chairpersons, Campaign Director and Coordinators of the various campaign activities, and is the hard core work force of your campaign.

In fact, the Steering Committee should be in place well before the Campaign Committee is formed in order to do the preparation and advanced planning needed. When the Campaign Committee is solidified, the Steering Committee becomes an integral part of the larger group. This is sometimes a delicate transition to make and some thought needs to go into how it can best be accomplished.

Steering Committee meetings should be held often to make sure each aspect of the campaign is going well -- assisting as necessary to find additional volunteers and other resources which may be needed.

Coordinating the various activities to avoid overlap and assure that the various sub-committees are working in concert is another responsibility the group will assume. In addition, the Steering Committee Serves as a back-up system in case one or more of the key people are unable for some reason to complete their responsibilities (sickness, death in family, etc.).

The Needs Committee

Gaining community support for the tax proposal can be initiated by involving community and school groups in an assessment of school needs. About six months to a year before the election, representatives of unions, clubs, service organizations and any other known community or school group should be invited to partic-

ipate in this study. A sample letter and committee charge is found in Appendices R and S, but keep in mind that the letter should be preceded by a personal contact with organizational leaders.

Needs Committee work should be completed approximately four months prior to an election in order to permit time for development of a specific ballot proposal and formulation of a winning campaign plan. Staff support to help the Committee will go a long way in helping to meet this deadline.

Some thought might also be given to conducting a survey of public opinion as part of the Needs Committee effort. Such a survey would then take the place of a survey held just prior to setting the actual ballot question and should include the kinds of questions which will be necessary in decisions concerning how the proposal should be "packaged".

The Campaign Committee

Creating broad based suppcrt for the campaign is accomplished through the Campaign Committee. This Committee has four major responsibilities:

* Agreeing on the amount of the millage or levy which should be placed on the ballot and recommending this amount to the Board of Education for consideration.
* Planning the campaign including theme, strategy, tasks, calendar and any other activities.
* Reviewing campaign progres, assuring sufficient volunteers and making sure the Campaign Plan is implemented.
* Keeping the campaign coalition together and challenging each group to send information to their members, actively encourage their members to be supportive, make a financial contribution to the campaign and provide their share of volunteer workers for campaign actions.

The Campaign Committee should include a representative from each of the major coalition groups, selected by those groups. Minimally this will include school booster organizations, PTA's, school employee organizations, administrative staff, board of education, and other organizations which are connected to the school. Each key community group should also be represented. Business groups, ministerial alliances, local unions, homeowners or block clubs, retiree organizations and various social or recreational clubs are examples of

those which should be asked to send representatives. In addition, Campaign Coordinators for each of the key campaign activities and any other members of the Steering Committee should also sit on the Campaign Committee.

This may sound like a large number, but the group will not be meeting more than three or four times. By having representatives of all the major community and school groups on the Committee you will receive the benefit of endorsements, financial contributions, volunteers and a legitimacy which such a broad coalition can bring to the issue you are marketing.

A letter of invitation should be sent to all key groups, but a personal contact with the leader of each group should preceed the letter. When the contact is made, emphasis should be placed on the importance of participation and a commitment should be sought for the group's involvement.

The Campaign Planning Meeting

One of the most important meetings which will be held is the Campaign Planning Meeting. While the Steering Committee has carried out the advanced planning and other early campaign activities, the campaign coalition group (which becomes the Campaign Committee) needs to agree on a plan for the final few weeks. In this way, all groups involved in the effort will have ownership for the plan. Additionally they will better understand what needs to be accomplished and how everyone will be working together to win. All members of the coalition who constitute the Campaign Committee should be present to discuss and agree upon the following:

* The amount of the millage or levy to be placed on the ballot. This will go to the Board of Education as the Committee's recommendation.
* A campaign theme.
* What each group involved in the coalition will be expected to do as their contribution to the campaign.
* A calendar for the campaign.
* A campaign plan which includes a list of all the major activities which will be undertaken and a timeline for each.
* A list of campaign leadership positions to be filled and names of persons who will assume (or be asked to assume) those responsibilities.

All of the above should be placed in writing for future reference by the Campaign Committee as well as by the Steering Committee and Campaign sub-committees during the course of their activities.

Approximately 4 to 5 hours of concentrated time by everyone on the Campaign Committee will be necessary in order to complete these tasks properly.

A CONSENSUS PROCESS BUILDS COMMITMENT and many decision making models are available to assist the group in reaching an agreement.

Whether or not a decision on the amount to be recommended should be on the same agenda with development of a campaign plan should be carefully studied. If it appears that considerable discussion and negotiation will be necessary in order to reach agreement on the amount to be recommended, a separate meeting is probably the best approach. If consensus will likely be reached quickly then both can be done in the same meeting.

Meetings

Nothing kills volunteer interest faster than meetings. There are several rules to follow which will attract and keep your volunteers:

* Always -- Always start on time.
* Always -- Always end on time -- or before.
* Have a written agenda -- and stick to it.
* Don't become involved in major philosophical discussions. The major issues have already been decided. Concentrating on implementation -- action.
* Ask that various points of view be quickly set forth in a way that enables the group to weigh their merits quickly and efficiently.
* Ask that "war stories" be reserved for breaks and after the meeting. Keep calling attention to agenda items needing resolution.
* Keep an outline record of decisions and assignment. Distribute this outline to group members immediately after the meeting and utilize it as a means of review when necessary to bring the group back on track.
* Make sure that everyone realizes that different points of view are important and expected -- and that decisions made are not of a life and death variety. Do not let minor differences keep you from the main goal -- winning.

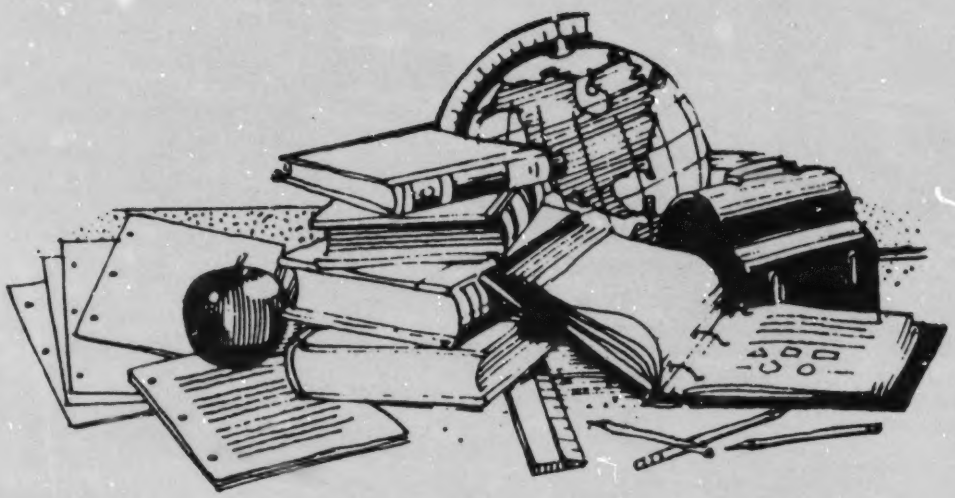
* Voting doesn't usually make sense. Work on a consensus model. This doesn't mean that everyone has to agree.
* Emphasize for everyone's benefit that everything depends on everyone doing their job. If someone doesn't show up, get on the phone immediately and find out why. Tell them everyone is waiting for them and counting on them. They need to be there -- or provide a substitute.

Meetings are particularly deadly where volunteer workers are involved. They came to work -- not to hash over the entire campaign. Make sure that any meetings held as part of a volunteer action are very short and get quickly to the tasks and activities. If there are important decisions to be made, get the volunteer activities going and ask that anyone who wants to be involved in the decision area meet off to the side.

Public Meetings

Public meetings usually have limited value because of sparse attendance -- or because, on occasion one group or another comes in mass, takes over your meeting, and defeats the entire purpose. Rather than public forums, debates, or open meetings, take your campaign to the people by tying into meetings of community organizations that have already been scheduled.

The 'File'



In many respects the "File" is the core of your campaign. It is an organizational tool which is used to focus each of the main campaign activities. Essentially, the "File" is a system of keeping tabs on all the people who vote or those who may be persuaded to vote. See APPENDIX M for a sample "File" format.

Creating And Maintaining The "File"

The "File" can be a series of file cards (such as 3 by 5 cards), it can be put on the disk of a home computer, or it can be on a more elaborate file on a larger computer. Micro computers are in extensive use these days -- both at home and in the office -- and are an excellent means of maintaining the "File". In almost every community there are a number of computer buffs who would be willing to help you get the right equipment (buy or borrow) and the right software. Even if you have to spend campaign funds, it will probably be worth it to have the information managing capabilities computers offer. In addition, you can utilize the computer to handle your word processing needs.

Computerization is the best and most effective means of maintaining the "File". However, it can be done by hand and the information on formatting for the computer can also be used in designing your file card system.

If you are going to consider computerization of the "File", the following criteria should be considered:

* Computer should have disk storage (consider hard disk). Tape is too slow and unreliable.
* Make sure there is enough memory and enough disk drives to handle the capacity you need.
* A high speed sorting capability is essential. You will need to be able to sort fields within fields. Example: All supporters alphabetically by precinct.
* Sort capability must enable search using a number of criteria. Example (looking for persons who may be difficult to turn out at the polls -- even though they are supporters): Print the names and phone numbers of all persons identified as supporters who did not vote in the previous two elections.
* Prints in a variety of print formats. You will need labels, election day lists, reminder call lists, lists for the registration committee, etc. Each may require different information.

Before purchasing or borrowing a micro-computer or accompanying software, insist on a demonstration. Time the capability to sort large data bases. Sit down and operate the computer to see how difficult it is to enter data or to generate printouts based on a variety of search criteria. Look at three or more systems.

Based on 1983 prices, sufficient capability for most elections (except in very large districts) will cost less than $4000 to purchase outright. A micro with at least 48K of memory and 4 disk drives should not cost more than $2500, a high speed dot matrix printer should not cost more than $800, and the software for both word processing and data base management should not exceed about $700.

"File" Contents

Information valuable to have in the "File" includes:

* Name
* Precinct
* Address (City, State, Zip)
* Phone number
* Birth Date
* Registered to vote?
* Student? Where?
* Graduate of this school district? When?
* Parent? Children in School? How many?
* School Employee? This District? Type Job?
* Family of School Employee?
* Involved in PTA?
* Involved in booster organizations?
* Participated in community education program?
* Worked in past election campaigns? Which ones?
* Contributed money in past election campaigns? Which ones? How much was contributed?
* Was an identified supporter in past election campaigns? Which ones?
* Voted in past elections? Which ones?

Precinct data is essential in order to provide election day lists to Challengers and callers in a form they can use effectively. Phone numbers are necessary because practically every campaign activity utilizes phone banks in one form or another.

Targeted mailings to senior citizens and other age groups, parents, graduates, PTA members, booster club members, employees, community education participants as well as other special groups requires that some means of maintaining this information be devised.

Keeping such data also assists in creating prioritized lists for voter registration, canvassing and a variety of other activities.

Information on contributors and volunteers helps not only with thank you notes but in identifying future volunteers and contributors. Those who have helped in the past are highly likely to assist again if asked. In addition, future campaigns can be off and running in high gear if information of this kind has been maintained and made available to the next Steering Committee.

Noting supporters is essential to building election day lists and is also helpful in future elections. Past supporters should be good candidates for support in another election. Records on whether or not a person voted are also helpful in planning campaign activities. They permit prioritization which enables emphasis to be placed on those persons most likely to vote.

Much of this information is also utilized in public opinion surveying to draw samples permiting cross-tabulation of data on important sub-groups.

In planning your campaign you may find additional pieces of information available that will be useful to you -- or you may find that some of the above information will not be helpful. In either case provide room in the "File" to add additional information if you find it will be helpful later.

Use Of The "File"

The "File" is utilized in virtually every aspect of the campaign. Some specific uses can include:

* Identifying non-registered potential supporters.
* Selecting a sample for polling purposes.
* Developing prioritized lists for canvassing.
* Preparing "walking lists" in door to door activities.
* Targeted mailings.
* Printing lists of identified supporters for reminder calls.
* Preparing lists by precinct for challengers and for election day calling.
* Knowing who to send thank you notes to.
* Keeping track of who has volunteered (they'll almost always volunteer again).

* Keeping track of who has contributed money (they'll almost always contribute again).
* Getting ready for the next campaign (if they were active last time, they are good candidates for committees this time too).

Data For The "File"

Names and data for the "File" can be obtained from a wide variety of sources. Some of these include:

* Voter registration files and updates to that file.
* Parent Directories
* Neighborhood Directories
* School files which are public information.
* Birth records available from County Clerks.
* Churches (esp. pre-kindergarten sunday school lists).
* Co-Op and other nursury schools.
* Kindergarten roundup.
* Census data.
* Athletic boosters, band boosters and other booster groups.
* Persons who advertise in school publications such as athletic programs and the yearbook.
* PTA.
* Community education participants.
* Community members who work on school committees.
* School employees in the district and their families.
* School employees from other districts and their families.
* Retired school employees.
* Recent graduates.
* Alumni reunions.
* Participants in events such as "Grandparents Day".
* Ticket purchasers (for plays or other events).
* Volunteer worker lists.

Using a File Card System

Remember, a computer can facilitate handling of information needed for an effective campaign -- but the job can be done by hand with a system of file cards. For each specific campaign need, the cards can be sorted by hand if necessary to establish necessary lists -- or to provide typists with the information required for mailing labels -- etc. For further information and a sample of a format which can be used for your file card system, see APPENDIX M.

Summary

The value of data on voters and prospective voters cannot be overstated. Practically every campaign activity suggested in this manual is directed toward a particular audience or requires a prioritized listing. By developing the "File" with care and dutifully maintaining it throughout the campaign, maximum effectiveness can be obtained with available resources. Additionally, a complete and updated file is one of the major resources available for the next campaign.

Pre-Election Survey

You always hear from vocal people, but do they really represent the community view? A survey is a way of listening to the community to find out what a broad range of people believe. It also provides you with information needed to counter the vocal groups when they are wrong. In addition, surveys are very helpful in planning and implementing a successful campaign. Many key campaign decisions will be incorrect unless good data is available on the attitudes of various voting groups.

Many persons think they know their communities but, in reality, a very superficial understanding of attitudes prevails. This is primarily because what you hear day to day about the schools comes from a small group of supporters or opponents. You don't hear much from the middle group which constitutes the vast majority. Also, we probably DO NOT hear enough from the supporters either. When was the last time someone showed up at a Board of Education meeting to say "I want the Board and staff to know that my children are getting a terrific education. You folks are doing a great job and I've got a petition here from all my neighbors thanking you"?

Most people who give verbal attention to the schools are strongly motivated because they are upset about something. They may be complaining that their taxes are too high or their child isn't getting enough playing time on the basketball team.

The news media may also contribute to the creation of a superficial view of our communities. Controversy or "interesting" news is likely to be covered while day-to-day activities are ignored.

The point of this discussion is that voters often get an unbalanced picture of the schools and draw conclusions which are wrong simply because they do not have a total picture. Surveys will give you this balanced picture. In addition, with cross-tabulation techniques, you can also derive information on specific subgroups which can help you to target campaign efforts and build winning coalitions.

Surveys are not difficult to accomplish. However, there is some technical "stuff" to understand and deal with. This section is aimed at simplifying surveys without compromising the validity of the data.

Please keep in mind that there are many different ways

to do almost every one of these steps and that polling experts will sometimes disagree with one another as to which may be best in a given situation. This section presents one approach to polling in school millage elections which produces valid results, without bogging the campaign committee down in discussions of survey theory.

Even though the campaign committe will be able to work its way through the survey maze, this is one of those areas where employing professional consultive advice should be considered. The largest cost of any survey is interviewing. Fortunately, this is something that volunteers will usually be available to do, and do well. The Campaign Committee may want to consider professional assistance in one or more of the following areas:

* Designing the Survey Instrument.
* Overseeing the drawing of a sample.
* Training the interviewers.
* Tabulating the results.
* Analysis of the results and preparation of a report.

The next few pages will present a step-by-step approach to a pre-election survey including information on how it can be used, validity, time line, jobs to be done, drawing the sample, training interviewers, data processing, analysis and reporting.

Use Of A Survey

As you map out campaign plans, a survey will play many important roles. It can help you:

* BUILD INTEREST (People will wonder what the poll will show).
* GET PEOPLE INVOLVED (This is an activity for which people will readily volunteer and become excited about).
* SET THE AMOUNT OF MILLAGE OR LEVY (Who knows -- people might be willing to vote more than you think they will, or you might be able to put together a coalition of groups sufficient in size and commitment to win).
* ASSESS PROBLEMS AND STRENGTHS (And now you'll know what to stress or to stay away from in the campaign -- or what will have to be corrected in order to win).
* DETERMINE THE LEVEL OF UNDERSTANDING (Do people really believe you're in financial trouble, or that you've made numerous program cuts?).

* TEST POSSIBLE CAMPAIGN ISSUES (Can an "undecided" voter be changed to a "yes" if they were to find out that ...).
* TARGET FOR
    - VOTER REGISTRATION (Testing potential voter support from amoung those who are not registered.)
    - PERSUASION (When you approach a group, zero in on those issues most likely to be persuasive.)
    - VOTER ID (Prioritize your efforts at identifying supporters.)
    - GET OUT OUR VOTE (Some of your support groups will need lots of attention approaching election day. With a survey, you'll know which to concentrate on and what appeals might be productive.)
* PACKAGE YOUR PROPOSAL (When should you have the election? What should be the duration of the proposal? What needs to be in the "package" to maximize the potential for support and at the same time offer the best program possible?)
* TEST STRATEGIES (Who should be "out front" in the campaign? Are there individuals or groups who should stay in the background?)
* MONITOR SHIFTS IN PUBLIC OPINION (Set some goals in terms of changing public opinion and find out in the next survey if you achieved them. Watch key behaviors and opinion areas for danger signals.)
* BE CONFIDENT IN YOUR CAMPAIGN DECISIONS (No more stumbling around in the dark).

Validity

The most valid survey would be one in which everyone was interviewed. However, this is not practical. A portion of the total group could be interviewed, but now there is a possibility that the results for the smaller group will be different than for the total group. Of course, this problem is more likely to occur if the size of the group being interviewed is very small.

The key questions are: How many persons should be interviewed to produce a valid result? and, How valid will be the results?

Strive for an error rate of not more than 5% at the 95% level of confidence. This means that 95 times out of 100, the sample will produce results within plus or

minus 5% of how the total population would have responded.

Jobs to be done

Here is a list of the major tasks which will need supervision. In some cases it might be desirable to identify sub-committees and designate leaders for each. In other instances, campaign coordinators which have already been identified will help.

* Designing the Survey Instrument.
* Pulling the Sample (help should be available from the "File" coordinator -- but someone will need to provide guidance on exactly what criteria are to be used in selecting the names).
* Phone Bank (if you have a Phone Bank Coordinator, this job will be taken care of).
* Interviewer Training.
* Refreshments (your campaign should have a Campaign Services Coordinator).
* Data processing, analysis, and report writing.

Timeline

Make an effort to spread activities over a 30 day period of time. However, it is possible to do a public opinion survey within 10 days. Even this timeline can be compressed, but to do so will tax the capability of most groups. However, all interviews should be conducted within a narrow time frame -- usually not more than a week. A possible 30 day timetable:

* Day 1 -- Organizational meeting, task assignment, time line agreement, develop areas survey should cover, identify volunteers.
* Day 2 -- Pull sample, write survey instrument, line up phone bank.
* Day 7 -- Agree on final survey draft, conduct pilot interviews, make revisions, duplicate survey, duplicate interviewer guides and other materials for the interviewer kit, assemble kit.
* Day 14 -- Train all interviewers, begin interviews, complete at least 35% of the interviews.
* Day 15 -- Continue interviews, complete another 40% or more of all interviews.
* Day 16 -- Conclude all interviews, clean up all responses (particularly the coding of any open-ended responses).

* Day 17 -- Process data.
* Day 20 -- Analyze data.
* Day 25 -- Prepare report.
* Day 30 -- Report results.

Developing the survey instrument

Your survey instrument should include the following components:

* Demographic information (this data will be utilized to generate cross-tabulations which enable you to look at each of the major sub groups in your community).
* Evaluation of staff and program (find out if you have some problems or if there are strengths which should be played up in the campaign).
* Credibility of Organizations and Individuals (Test whether there are groups or persons who are highly credible and could therefore help by being visable. Also test to see if there are those who should maintain a low profile)
* Finances (Have schools done a good job with money? Would you vote for an increase of ...?)
* Possible Campaign Issues and Themes (What turns people on, or off).

Included in APPENDIX A is a listing of some possible questions categorized according to the above areas. This will help you in designing the specific questions to be asked. Local issues should be reviewed to see whether other questions should be asked to obtain a clear picture of public opinion in your community.

Confine the total number of questions to a maximum of about 20. With each additional question, you extend the time needed to conduct the interview and the time which will be required to complete the survey. Limiting the number of questions will also force you to come to grips with what is really important. One guideline which may help: if you can't really come up with a way in which the information is needed and will be used -- don't ask for it.

Each question used needs to be carefully analyzed to assure that it is a neutral question. Does it fairly, but briefly, state the issue? Does the question avoid being slanted toward a particular answer?

After developing a draft survey instrument field testing is very important. Call 24 to 30 persons and go through the instrument as if the interviews are

"for real". Note their reaction to the questions. Do you need to change any question to make it clearer? Were any questions offensive to the person called? Time these sample interviews. You will want to be able to complete interviews in less than 6 to 8 minutes in order to meet your timetable. Longer questionaires can be considered if there are sufficient volunteers and enough time to process and analyze the data, though these are generally not recommended.

Placement of questions is often important. Start with simple questions which will not be controversial. This makes it easy to loosen up the person being interviewed. That is why many have a preference for using a few general demographic questions first, such as "Do you have children of school age or younger?". The bulk of demographic questions should probably come at the end of the survey. A person generally becomes restless about 6 to 8 minutes into an interview and it is helpful to place key questions early in the survey so that only a few demographic questions will remain when the person might want to end the interview. Most people are willing to take just a few extra moments to provide demographic information about themselves.

You should review the location of questions to see if the placement of one question would tend to bias the answer to another. As an example, you may need to find out whether a person thinks the schools are in financial trouble. Such a question should come before one like: "In order to remove our current debt, taxes would need to be increased by 1 mill. Would you vote for or against this increase to remove the debt?"

A list of the possible responses is very important. When your interviewers begin calling, nothing is more frustrating than to constantly have to write responses in the margin because none of the ones listed seem to fit. A pre-test will help anticipate the most frequent respones to each question. Categories provided for responses should anticipate all possible responses. Sometimes it will be necessary to include room for "other". Also provide for "don't know" or "refused" (the number of refusals will generally be so few that these two categories can be comfortably combined)

One final thought. Meet with those who will do your data processing before finalizing the instrument to be sure that the coding system will be consistent with their capability to transfer and analyze the data.

Drawing the sample

Although there are numerous ways in which you could define the "universe" you wish to survey, it is recommended you limit it to registered voters.

The first task will be to count the number of registered voters. Figure 7-A is set up as a worksheet for this and other data which will go into decisions required prior to pulling the actual sample.

Figure 7-A
Data For Pulling The Sample

1. Number of Registered Voters _____
2. Interviews Needed _____
   (Consult APPENDIX B)
3. Skip Number _____
   (Divide Registered Voters by Interviews Needed -- don't round up)
4. Start Number _____
   (Number between 1 and the Skip Number chosen at random)

The second task will be to determine the number of interviews which will be required to achieve an error rate of plus or minus 5% at the 95% level of confidence. Consult APPENDIX B for this. Look down the column for registered voters until you come to the number equal to or greater than the number of voters in your district. Directly to the right will be the number of interviews needed.

Now, determine the skip number (selection interval). To get the skip number, divide the number of registered voters by the number of interviews required. Ignore any remainder. This will assure that you always have enough persons in your sample. You may end up with a few extra, but that will only improve the confidence you can have in the results. This is the number which will be used to pull the sample.

Once you have selected the first person for the sample (using the "start" number) your primary sample will be every nth person thereafter on the list (n being the skip number).

To establish a point at which to start pulling your sample, select at random a number between 1 and the skip number. You can do this by asking a computer for a random number, using a random number table, or simply by writing all the numbers between 1 and the skip number on pieces of paper and have someone pull one from the group with their eyes closed.

Get sufficient copies of the "Survey Sample Phone Sheet" to record a primary and 3 alternates for each interview which must be completed (see APPENDIX C).

You are now ready to begin pulling the sample. Count down the list of registered voters until you come to the "start" number. This will be the first person in your primary sample.

Copy this person's name, address, birth date, precinct and sex in the left hand column of a "Survey Sample Phone Sheet". Note the person's voting behavior on the sheet by recording whether the person voted in 0, 1, 2, or 3 of the last three elections.

Now, use the skip number to locate your next primary name and copy data for this person.

Repeat until you have gone thru the entire registered voter list. Note: The "start" number is used to get the first name only -- after that, use the skip number to locate all your primary names.

Having selected all the primary names, begin the process of selecting at least three alternate samples -- possibly four or five additional samples if it is likely that many of the persons who are registered to vote have moved. Use the same technique to select each of the alternate samples as was used in selecting the primary sample. Begin with a random number between 1 and the skip number, and then use the skip number to locate remaining persons for the sample.

When listing alternates on your "Survey Sample Phone Sheet", be sure that the alternates to the primary person selected are of the same sex and from the same precinct. As you approach the last few lines to fill on the "Survey Sample Phone Sheet", it might be

necessary to deviate somewhat from this procedure because the primary sample might have a small difference from alternate samples in terms of sex or precinct makeup. It is usually correct to give preference to alternates from the same precinct as the final few lines are filled in.

Phone numbers are essential. Look up numbers in phone books or other sources and record them with the names of all persons (primary and alternates) in your sample. If numbers cannot be found, you may have to select additional alternate samples in order to have sufficient names that can be reached by phone.

Number each primary name in the sample from 1 to the total number of interviews (you may have a few extra, and that's ok). Alternates should have the same number as the primary, but, add a digit on the left which represents which alternate they are: 1, 2, or 3.

Example:

Primary	1st Alternate	2nd Alternate	3rd Alternate
0001	1001	2001	3001

This will help you keep track of substitutions which might be made during the course of conducting the interviews when none of those in a particular row can be reached.

In most cases, with a volunteer crew of about 15, the sample can be drawn from the registration books and phone numbers looked up in about 4 hours.

You made it! The hard part is behind you in terms of learning the technical side of surveying.

Interviews

The Survey/Canvass Coordinator should work closely with the Phone Bank Coordinator in planning and carrying out the interviews. Phone interviews provide the most efficient means for conducting the survey. For a poll of about twenty-five questions, interviews can be concluded in a three day period using ten phones four hours each day. Calling between 5:00 p.m. and 9:30 p.m. will enable you to reach most people (don't worry about calling during the dinner hour), and volunteers

are usually easiest to find for week-day calling. Consult the Section of this Manual on Phone Banks for greater detail on the why and how of organizing telephone interviews.

Training the Interviewers

About an hour is needed to train interviewers. You can ask that volunteers report early for their shift in order to go through the training, or, you can have a separate training session. You may want to combine training and a night of interviewing because some will not be able to attend a special training session.

Have a "kit" ready. The kit should have everything interviewers will need. Pencil(s), copy of the survey instrument, an interviewers guide (See APPENDIX D), other information you think they might find useful, and a sample of the "Survey Phone Sheet".

Suggested Agenda:

* Welcome (Let volunteers know how important this job is and how much you appreciate their willingness to help.)
* Review the "kit" (Make sure they have everything they need.)
* Go through the Interview Guide (Help them to understand how to do an interview, the coding process and how important it is, and how to handle problems which might arise.)
* Go through the Survey (Take each question one at a time and discuss any concerns they might have concerning recording the responses.)
* Questions and Answers (What additional things do they have on their minds?)
* Practice (Work with a partner to practice being an interviewer. Do this several times until they feel comfortable.)
* Pick up the phone (The toughest part. Having done one or two though, they will be veterans.)

While interviewing

As interviewers go about their work, trouble spots may occur. Some volunteers are simply not cut out to do phone interviews. As you identify them, ask them to help you with another very important job such as checking each interview sheet to see that everything has been recorded and coded properly. They might also help in looking up additional phone numbers.

As the interviews are completed, someone needs to check each interview sheet and make sure all is in order. Responses should be included for all items. A quick discussion with the interviewer will often reveal an answer that wasn't recorded, that the person refused to answer, or one that the interviewer forget to note. Another "clean up" task is to make sure that all "open ended" responses are categorized and coded. When the interview sheets go on to the data processing stage, everything must be in order.

Sometimes neither the primary name nor any of the alternates in that row can be contacted. This will require a substitution. If you find it necessary to substitute, do so with a person of the same sex and the same precinct as in the row of names which cannot be reached. Select a name from a row where one of the persons has been interviewed.

Data processing and analysis

It is best to utilize computers at this stage. There are several software packages which will accept the data and provide compilations with cross tabulations and include chi-square and other statistical treatments.

Figure 7-B
Sample Tabulation Sheet

Question	Sex: Male	Sex: Female
1. a	5-8	2-7-9-11
b	1	3-4-6-10

In this example, 11 interviews have been tabulated. 5 persons answered question 1 by selecting response (a) while 6 chose response (b). Of the 11 respondents, 3 were male -- one of whom chose response (a) while the others chose (b). Females constitute the remaining 8 respondents of whom 4 selected response (a) and 4 response (b).

However, to do it manually the following is suggested:

* Limit the number of cross tabs.
* Lay out a tabulation sheet with each column being assigned to a cross tabulation response area.
* As you go through each interview, note the response for each question. Then look to see which cross tabs apply and add a mark to the appropriate cell. You might consider listing the interview number instead of a hash mark so you can verify which interviews have been processed.
* Now total all the cells and compute appropriate percentages.

Spend some time thinking through this tabulation process. Avoid the problem of having transferred all the interview data and then discovering that the process was not fully understood.

Analysis

It will certainly help if someone with some research and statistics background is available to help with this phase. However, the following suggestions will help you avoid some pitfalls.

Cross tabulation data on small groups is unreliable. At the point where several responses going a different way can make a difference of 5% or more in the percentages -- force yourself to ignore the data. Generally speaking, at least 100 in a sub group is necessary to feel comfortable with the results. When lowering this to 50 or 60, keep in mind that the results will need to deviate from the norm even more than usual in order to find them significantly different. The smaller the subgroup, the larger the error. Consultation with a survey research/statistics expert would be helpful at this point.

Look at responses for a sub-group that differ considerably from those of the entire group. When the difference exceeds 5% (for a large group) to 10% (for a small group) you will want to look seriously at those results as being potentially significant.

View differences as the basis for tentative conclusions, then look at the rest of the data to see if those conclusions can be justified on the basis of results from other questions in the survey.

Look particularly at parents and non-parents, those who know a school employee and those who don't, newcomers and oldtime residents, males and females, and retirees and other age groupings. A considerable amount can be done with these subgroups in a campaign.

Reporting

While overall results are what most people will look for in your report, it is the cross tabulation data that can have real impact in a campaign. Here is one example which will demonstrate reporting and utilizing your results with school employee groups:

One question often asked on school surveys is whether or not the person has a "close friend" who works for the schools. By separating this data on the basis of those who have friends working at the school and those who do not, it is possible to develop several helpful approaches to working with school employees.

In a typical district, between 40% and 60% of the voters will have a friend working for the district. This can be discussed with the staff from the point of view that their friendships are valued and relied upon for information about the district. Most staff members will be surprised to realize how great their influence is and will be flattered to learn (which is usually the case) that the community thinks very highly of their work.

You can also review with employees those types of questions in which friendship seems to result in quite different responses as opposed to those questions in which their friendship does not make as much difference. This will help staff to focus on particular topics of conversation in their social relationships which will be to the benefit of the campaign.

Where the percentage of persons with school employee friends is low, you can often approach staff with data on how effective they are with those who are their friends -- and ask that they take it upon themselves to expand their range of friendships so that their influence can be even more extensive.

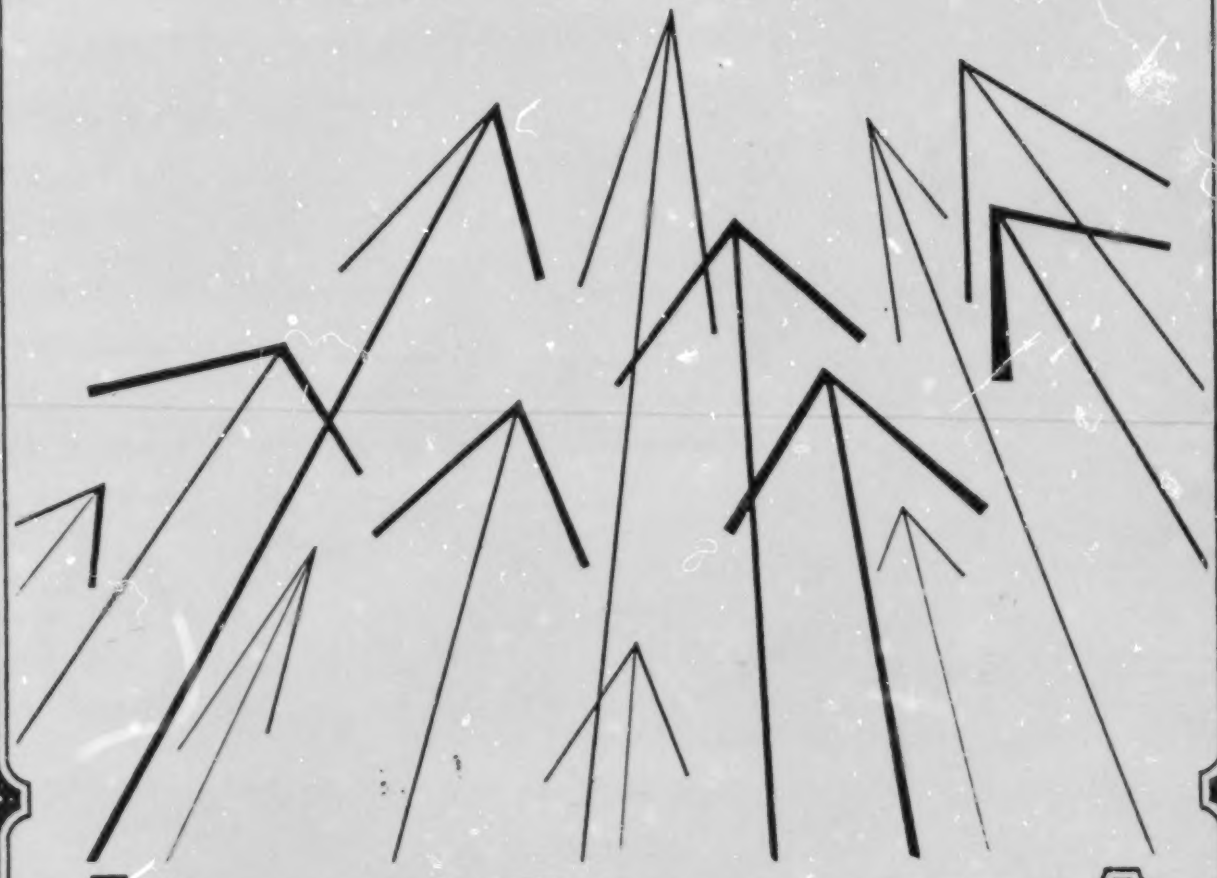
This brief discussion gives you some ideas which can generate creative approaches to the use of survey data as it is reported to the various groups involved in

the campaign.

Summary

Because data is required for so many campaign activities, a pre-election survey should be considered virtually mandatory. Many try to avoid this task and therefore do not know what the specific viewpoints and attitudes are of various audiences in the community. This can lead to decisions which will prove disasterous to the campaign. Technically there is much to understand and cope with but the tasks are not beyond the reach of local groups. Consultant help is widely available. Do not let the multitude of "jargon" scare you away. Jump right in and get it over with. Who knows, you might have a little fun. You will learn a lot, and chances for winning will be increased many times.

Packaging the Ballot Question



At the point where the Board of Education sets the proposal, to a large degree, the difficulty of winning is defined. When the election will take place, the amount of millage, renewal plus additional, one package or a smorgasboard, and the length of time the levy will run are all important in determining the chances of winning.

Identify school needs

Six months to a year before deciding on the ballot question, the Board should involve key persons from the school and community in determining needs of the schools with no talk about millage amounts at this point. School employees, parents, students, merchants, non-parents, private and/or parochial school people, labor unions and virtually every other audience which exists in your community should be invited for meaningful input.

Charge this group with a careful study of the district and its needs over the next three to five years. Their report should be made about four months prior to the election and the Board will be well advised to accept their recommendations because it is this group that will become your election campaign coalition (the Campaign Committee). Most of them will be your campaign workers and/or boosters in the upcoming millage election.

Deciding the ballot issue

Just prior to the time for the Board of Education's decision on the exact millage amount, the coalition should be reconvened. All relevant information concerning the school's fiscal situation should be reviewed. Survey data should be studied. Income estimates from all sources should be available. Any other important facts should be discussed. Out of this meeting should come a recommendation to the Board of Education for the ballot issue. The Board should work to assure that it is a consensus recommendation.

Included in the recommendation should be the amount of the proposal, the duration of that proposal, and an election date.

Board of Education consideration should emphasize the recommendations of the Coalition, prior input on educational needs of the schools and the importance of being prudent with taxpayers money. Groups and

individuals should be invited to offer comments and suggestions. The Coalition group should be well represented with articulate spokespersons.

Following careful deliberation, the Board should make its decision -- and that decision should be to ratify the recommendation of the Coalition unless persuasive information can be produced to alter its conclusions. Failure to ratify will jeopardize trust in the Board among the community and school groups who participated in the input/recommendation process. In addition, the Coalition will likely break down and the election will be lost. If the Board has involved all the relevent groups necessary to winning, concurrence with the recommendations of the coalition should not be objectionable.

Timing

There is great debate on when to "go for millage". Annual school election, December, April, etc. While election data show that there is no "correct" time of year, here are some points to consider when setting the election date:

* Should school still be in session? Is it important to have the normal communication channels available? How important is it that people not be scattered to the winds on vacation?
* Will receipt of heating or cooling bills at election time be a factor?
* When do property tax notices go out?
* Are student voters important? (More of a June graduating class will be of voting age in June than at earlier times in the school year. Once they are graduated, it is very difficult to get them to vote. If the election is held earlier than June, many students will be unable to vote because they haven't yet become eligible.)
* Are there major interruptions such as summer vacation to cope with?
* When do people pay their income taxes and receive a refund if it is due?

In choosing an election date, pay attention to vacation schedules. Holding an election just after spring break for instance, means you will be without many volunteers -- just when you need them most. Check also on local activity calendars for possible conflicts. You don't want an election on the same day

many in the community are at the County Fair or when the Athletic Boosters have arranged an outing for athletes and their parents at a sports event out of town. Try to avoid days when sizable blocks of your supporters have another activity for even a portion of the day. Not only will you be short votes, but there will be a shortage of volunteers too.

If there is a weekly paper in your community, consider an election the day before it is normally "on the streets". This will provide some time for the impact of advertising, letters to the editor and major coverage to be digested by the voters.

Other considerations may come into play too, such as when taxes must receive approval in order to be levied or the proximity to other election dates. The best date might also be the usual and customary time you have always asked for millage. Another criteria might be that by using the annual school election date, you avoid the charge of "wasting tax dollars" for a special election.

<u>One package or more?</u>

There are three basic ways of "packaging" the proposal (Michigan Department of Education data for the school years 1979-80 through 1982-83 indicate that chances for success vary greatly for each case):

* Renewal Only (From 88% to 92% were adopted)
* One Proposal for Additional Millage (From 22% to 33% were adopted)
* Combining everything into one issue (From 46% to 50% were adopted)

If you don't need additional millage -- don't ask for it. On the other hand, if you do need additional millage there are several practical reasons, other than voting data, for packaging it as one issue. These include:

* One issue is simple. You don't muddy the water by talking about renewals and additionals -- or a number of additionals.
* All segments of the community will work together for their particular interest to be realized.
* Most voters do not understand school finance. "Renewal" means not only renewing millage, but "renewing the program" as well. How many of you have explained in multi-issue campaigns that such and such will be cut if all proposals

do not pass -- only to be faced with angry parents when only the renewal passed and you cut art, elementary counseling, and JV sports? These parents voted for a "renewal" -- a continuation of the program -- not "extras".

You will save endless hours of time and energy in packaging an issue which includes a renewal of 26 mills and an additional 2.4 mills as simply "28.4 mills to renew and continue all programs while streamlining wherever possible." Then your message is simple -- it costs 28.4 mills to continue offering our young people the usual educational program.

Duration

Are key voting groups attracted to a longer term millage which can provide better opportunities for planning? Does a unique problem require a short-term stopgap measure? What impact will projected economic conditions, such as development of local industrial property, have on school finances? Local attitudes and conditions are critical factors in deciding the duration of millage proposals. A pre-election survey can sometimes explore voter attitudes on issues which can be helpful in deciding the duration question.

To change or not to change?

The major factor in a school district's credibility is doing what you said you would. Running a campaign for 28.4 mills in June and returning in August with 27.2 is likely to create certain mind sets and problems:

* The district didn't know what it was doing.
* The district didn't really need the money in June.
* Millage workers and the coalition groups are frustrated.
* Confusion is created among the voters.
* Support from special interest voters who perceive that their concerns have gone by the wayside is jeopardized.

Of course there are certain circumstances (ie. large enrollment shifts, a big increase or decrease in State Aid, etc) where changing the millage amount is necessary. Convene your committee and thoroughly review the new data or other reasons for change before making a final decision.

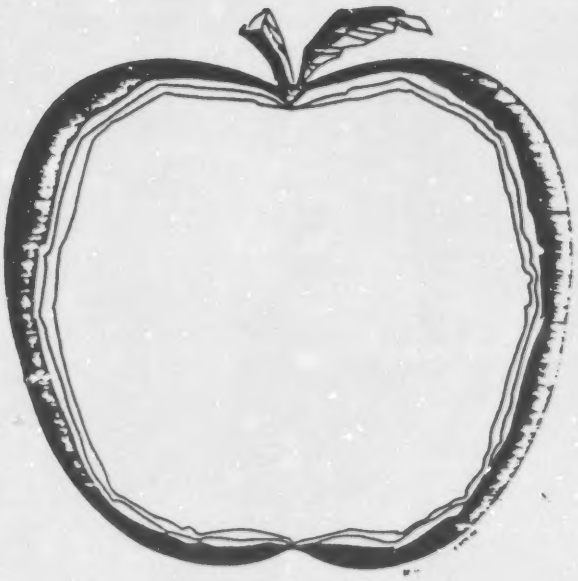
Amount

Don't argue too much about one mill or a partial mill. How many people do you know who can explain what a mill is? Put what is needed on the ballot -- nothing more and nothing less. You are unlikely to sell a tax proposition on the basis of having cut the amount by .375 mills. This will be particularly true when your coalition begins to wonder which of their concerns is being cut or eliminated. Package the issue along the lines of program and benefits for young people.

Summary

Deciding how to "package" the ballot proposal should result from the meaningful involvement of the many community and school groups. "Ownership" for the decision is probably the single most important factor in chances for acceptance and success. Beyond that, there are both legal and practical considerations to contend with. Keep in mind that most people have no real idea of what constitutes a "mill" or a "levy". The ability to relate the proposal to student and community needs is a far more important consideration -- and the ability of individuals and groups to make that relationship is often rooted in their own involvement with the schools or the campaign effort.

Campaign Theme



Creating a theme is one of the most important tasks in campaign planning. It provides a simple explanation of what you are trying to accomplish, brings the broadest possible group together for one common goal, and has persuasive impact. It is the one item you want people remembering when they go into the voting booth. An overall focus on children and programs is usually best.

Theme Conveys Your Campaign Image

The theme needs to represent the "image" you want of your campaign. Review your survey data. What were some of the items around which there was a lot of community consensus? Items on which virtually all sub-groups were in agreement? What image is represented by these items? Can you convert that image into a theme? In one community, "excellence" might be widely valued while in another they would be upset that more than the "basics" are suggested in a theme. Adjust the theme to your community and your current situation.

Very often several images are projected through your theme. Don't hesitate to do this as long as the theme is contained within 5 words or less. "Vote YES to Keep Quality" suggests several images: our schools are quality schools, quality schools are in jeopardy, we're just trying to keep what we have -- nothing new, you have to vote "YES" if you want to maintain quality schools. All this within 5 words or less.

Keep It Brief

A campaign theme should be very short -- usually not more than 5 words long. You need something that voters can remember. It will also help to have a theme which can be quickly read so it can appear on all your literature, letterheads, envelopes, and other campaign efforts. Another reason for having a short 5 word or less theme is that it forces you to think through very carefully how to translate what is probably a very complex issue into a short and simple phrase. Most voters require such simplicity and you must satisfy that need to improve chances of winning.

Appeal To A Broad Audience

Your theme needs to represent the broadest possible level of agreement among your coalition groups as well as those you believe must become supporters in order

to win. "Vote YES for Band" for instance, will be very attractive to the band boosters -- but is not any kind of rallying cry for many other groups. "Vote YES for Basic Education" has wider appeal and is an example of the kind of theme you should be looking for. Then, when meeting with the band boosters talk about how band is one of the basics and they need to vote "YES" for basic education.

Make a list of the many groups in your community. Social clubs, unions, boosters, ministerial alliance, business groups, etc. Then think theme ideas out from the point of view of each of these groups. Is the theme broad enough in scope that they can all buy into it (or at least enough of them to win)?

Appeal To Self-Interest

Remember that while your theme is of interest to the hard core school supporters, the group you must really appeal to are those in the middle who haven't made up their minds yet. You must be sure that the theme makes sense to them.

A good theme will enable you to develop areas of special interest to the group you are working with -- and still stay within the scope of the basic theme. When meeting with a homeowners group, addressing their interest in maintaining resale value for their homes can easily be accomplished within a theme such as "Pride in North Fork Schools". People respond best when you can appeal to their self interest and push them to recognize that their self interest can only be satisfied if they work together with all the other groups for the overall goal.

Theme Ideas

While we would not want to suggest that there are some all purpose themes which could be utilized in virtually any campaign, APPENDIX E contains a list of sample themes. These might be helpful in triggering some creative thinking as you develop your own theme.

Stick With Your Theme

After a theme has been set, don't change it. A better one might come along, but if you spend the entire campaign trying to decide which theme will be used -- voters will become confused and your chances of winning will decrease. Better to go with what you have

and make the best of it.

Summary

Your theme must express the important messages and images desired in the Campaign Plan. Keeping kids, program, quality, pride and the like in the forefront is usually the key to winning elections because those concepts appeal to important self-interests in a broad range of community groups. Choose a theme carefuily. It is the one thing you want voters thinking when they go into the voting booth.

Written Materials

Written materials are important in any campaign. They not only convey a written message, but an image. Size, color, content, layout, and other factors are important ingredients in this aspect of the campaign.

School issue campaigns need:

* Brochure (One all purpose, simple, straightforward, short, brochure will be needed. It should be filled with pictures or drawings of children, that will be used throughout the campaign.)
* Flyers (Several one page flyers aimed at specific groups will discuss the campaign theme from each group's particular self-interest.)
* Newsletters (Insider information aimed at campaign workers and supporters. Would come out several times during the campaign as needed.)
* Fact Sheet (Aimed at campaign workers and the occasional voter who wants or needs indepth information on the issue. This would not be generally used in the campaign.)
* Mailings (Targeted at groups and individuals with specific messages geared to their self-interests.)

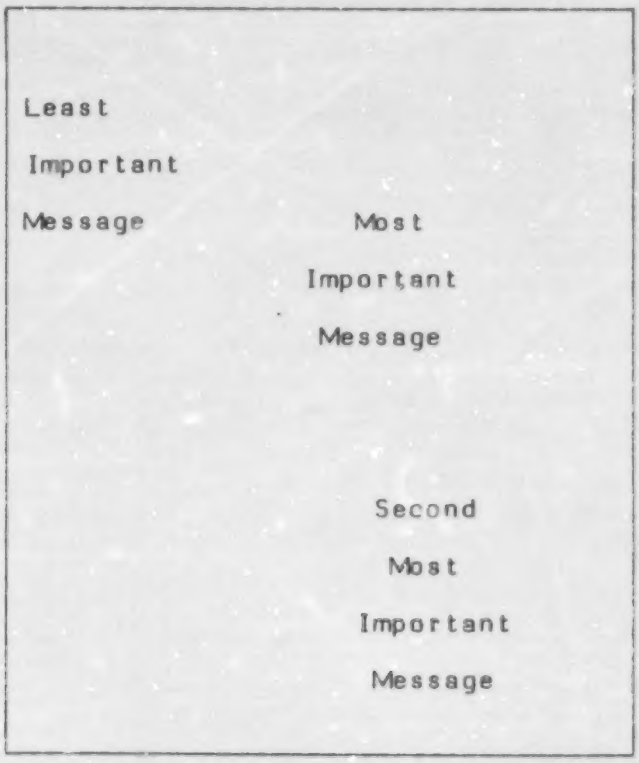
Brochure

You will only need one brochure. Do a good job on it because you will use it everywhere -- throughout the campaign. Keep it short and simple. You need something that can be read between the time the person picks it up and walks to the waste basket to throw it away. Reading time (except for a small section of fine print) should not exceed about 15 seconds. Use everyday language that people understand. Loaded words are OK -- as long as they are consistent with the image your campaign wants to project and promotes your general theme.

Examples of Words to Use	Examples of Words to Avoid
Pride	Mills
Family	S.E.V.
Teamwork	State Aid
Programs	Assessment
Together	Tax Credits
Children	Out of Formula
Community	Categorical Aid
"Our" School	Allocated Millage
Commitment	Bonded Indebtedness
Accreditation	Operational Millage

Be sure to design your brochure to "catch the eye". There are a variety of techniques to do this. DO NOT cover the page with print. Use lots of white space. Use pictures. Put your campaign theme in a prominent place on the front cover -- and in a prominent place on the back cover. This is the message you want to convey -- put it in the most important places.

Remember that the eye approaches a document from the right. The first "area" it will see is a spot just above the center, and just to the right of center. From here, the eye sweeps clockwise until it reaches the upper left hand corner. You should put your most important message for a particular page at the location your eye will go to first. Other messages should be placed in priority order along a path the eye will travel.



Your brochure, like all other campaign materials, must reflect the image you are trying to project for the campaign. If your theme centers on maintaining

program, the brochure should focus on program. If your theme has to do with people working together, be sure that the brochure shows what can be accomplished when people do work together.

Fancy paper and high quality printing isn't essential but the brochure should look good. Get too fancy and people may wonder where the money came from to print it, but a sloppy job is not the kind of image you want for your campaign.

Don't forget to put a notice somewhere that "This brochure was paid for by ...(your committee's name)...". Pay attention to having your printing done at a union print shop if that will be an issue with some groups in the coalition.

Flyers

One page flyers which develop your campaign from a variety of self-interest areas are very helpful. Identify three or four major interests and concerns that fit with your theme and build a flyer around each. These can then be utilized in meetings with groups who have one of the self-interests addressed, or as part of targeted mailings.

You might want to have three flyers. For example, one primarily for parents might emphasizes your theme by relating it to school programs their children need. A second, aimed at the business community, might call attention to your theme as it impacts on how schools and local business are working together for better and more cost efficient programs. Booster organizations might be the target of a third flyer which could emphasize how students taking advantage of athletics or music opportunities will gain from a "YES" vote -- relating always back to the campaign theme.

Pay attention to principles of layout and design. Keep it simple with lots of white space and use your theme prominently. Work to obtain emotional impact. Stay away from a facts and figures approach -- save that for your fact sheet. Graphs and other visual means of making your point are always good, provided they are readily understood.

Newsletters

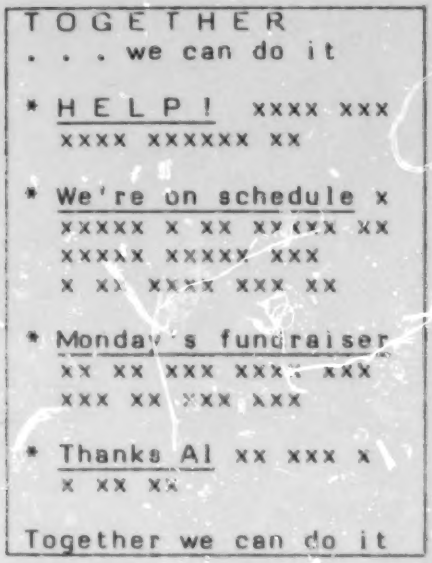
You need something to keep your troops together. A newsletter is just the ticket. Some humor. Some

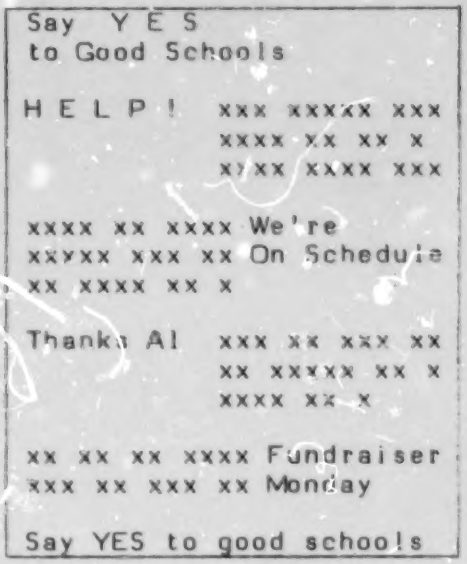
inside information. A little enthusiasm. Notices about upcoming events. Quickie progress reports. Send your newsletter to supporters too. Add their names to the mailing list as they are identified (work with the File Coordinator on this).

Develop a masthead. It should include your campaign theme -- prominently displayed. Put your committee's name, address, and phone number there too.

Newsletters should be made up of short paragraphs. You don't want lengthy progress reports or editorials. Get your point across in one or two brief sentences.

Here are some layout ideas:


TOGETHER
. . . we can do it
* HELP! xxxx xxx
xxxx xxxxxx xx
* We're on schedule x
xxxxx x xx xxxxx xx
xxxxx xxxxx xxx
x xx xxxx xxx xx
* Monday's fundraiser
xx xx xxx xxx xxx
xxx xx xxx xxx
* Thanks Al xx xxx x
x xx xx
Together we can do it


Say YES
to Good Schools
HELP! xxx xxxxx xxx
xxxx xx xx x
xxx xxxx xxx
xxxx xx xxxx We're
xxxxx xxx xx On Schedule
xx xxxx xx x
Thanks Al xxx xx xxx xx
xx xxxxx xx x
xxxx xx x
xx xx xx xxxx Fundraiser
xxx xx xxx xx Monday
Say YES to good schools

Each item should be highlighted in some way. Underline several key words or put them in bold print. Indent every other item. Put a box or an arrow to the left of each item. Find some way to show it off.

Keep your newsletters to one page. Use the back side for mailing labels and your campaign theme. When tri-folded and ready for mailing, one side will have the theme prominently displayed and the other side will have room for the mailing label. Push your theme everywhere.

Fact Sheet

Remember, you are not going to distribute the fact sheet as your main piece of campaign literature. You cannot win by emphasizing facts and figures. The fact sheet will go to the occasional voter who says "I need to know where every dime is going. Give me all the facts."

The main purpose in having a fact sheet is for the volunteers who are working in the campaign. They need to know answers to a number of key questions -- and they need to know areas where there are no answers. You will want to take a fact sheet to your meetings with editors, news directors, and other media representatives when you make your initial contact with them regarding the campaign. You will also want to have copies available when campaign leaders go to talk with key individuals in the community. They will need to have it in order to be able to say that they have carefully examined all the facts and they have concluded that the proposal should be supported.

The fact sheet will be more than one piece of paper. It will be a small booklet which sets forth all the relevant information upon which the decision was made to place the proposal on the ballot. It can easily be a reprint of the documentation given the Board of Education on the proposal.

Facts which are known and available and relevant should be included. However, some questions are better left without answers. This is particularly true of areas which could divide your coalition -- or which could give groups within the coalition less reason to work during the campaign. Discussions of what cuts will or won't be made should be avoided. Trying to speak intelligently about the future is difficult at best and only adds to voter confusion. Concerns which are raised by individuals wanting to know can be legitimately answered by pointing out that "We don't know. That's a bridge we'll cross if we get there. Right now the important thing is to work together and get our proposal passed."

Comparative data is usually very helpful. If your tax rate is below that of surrounding schools, or your program offerings are sub par, or your test scores need to be brought up, these are examples of items which most individuals can easily relate to in justifying their support for the proposal.

Mailings

This is one of the more interesting of all the discussions on written material -- because modern word processing techniques make all sorts of things possible that haven't really been available in the past.

Targeted mailings to special interest groups enable you to develop your campaign theme from their particular self-interests. You can relate to the band boosters, athletic boosters, chamber of commerce, local ministers and any other group in ways that bring your theme home to them based on each group's interests. Enclosing an approprite flyer in the mailing will reinforce your letter.

As groups endorse your campaign, you can work with them in developing specialized mailings that they can send to their membership. One mailing might go out with a notification of the endorsement and the rationale for endorsing. Another could be sent which re-emphasizes the endorsement with some specific examples of how it will help members of their particular group. A third mailing can be sent just prior to the election reminding members how important voting YES will be to the group and to the community.

As supporters are identified during the campaign, individual letters can be sent from the chairpersons. These letters thank them for indicating support for the campaign and invite them to participate actively in various campaign activities.

When individuals are identified as undecided, a personalized letter can be sent to them which zeros in on a specific concern they may have mentioned. Word processing capabilities now enable you to have a wide variety of paragraphs available from which you can select any combination to be included in the letter. All letters can be personalized as well as envelopes prepared.

Thank you notes should be sent after each campaign "event", thanking those who participated. These too can be personalized. They need not be long. What an impact you will have when a volunteer receives a next day note of thanks for a job well done.

Practically every community has a number of persons who are familiar with word processing equipment and

programs. And if not, you will have little trouble getting someone trained in a few hours on how to utilize functions that merge mailing lists with letters or that check for spelling errors or ... This is an exciting new world for campaign affectionados.

Some Additional Notes

In many communities it is important to be sensitive to the need for using union printers. There is no sense alienating important groups.

If you are going to utilize color in any of your campaign literature, pick one color combination and stick with it. Remember that color is an identifier -- just like your theme. People will remember and associate color with your campaign.

Color also makes an important statement about your campaign. Some colors will not give your campaign the image you want left in the minds of voters. Think this through very carefully. Get a group together and have them react to several different color combinations.

With modern reproductive technique, it is possible for anyone to have good looking printed materials. Use clip art, cut and paste, be creative.

Don't forget legal notices which might be required such as "Paid For By The We Care About Kids Committee..."

Getting a group together to critique your brochure and other written information can also be very helpful. Are they attracted to it? What image does the material give out? Do they find it readable? Would they be enticed to read it? How can it be improved? Show them several mock-ups and ask them to tell you which they prefer. They might like one for layout, another for content, and yet another for impact. Have such a meeting before printing (sounds silly to make such a statement, but there have been campaigns where this wasn't done).

You have a lot of local talent to draw from -- but they will usually need a little time to help you. Photographers, writers, layout experts, graphic artists, editors, printers, and many others will gladly donate time and expertise. The key is to ask

them. It is important to ask -- even if you have the capability to do these tasks yourself. The result is that many more persons are brought into the campaign -- and for every volunteer, you can usually count on 2 or 3 votes. They will get caught up in the effort, meet a lot of nice people, have a good time, and do something for their community -- all at the same time.

Whenever you prepare written materials (or make any kind of contact with other people during the campaign for that matter), be sure to include a specific request for assistance. Thank you notes can also say "look forward to seeing you at the campaign fundraiser next week". Newsletters can announce, "Meet at 10 a.m. Saturday in the campaign headquarters for our two hour door to door canvass." Letters to supporters can include an extra brochure with a request to share it with a neighbor. People want to be asked. They might not be able to help with a particular activity, but they will be flattered that you called them. You will be surprised at how many persons will be converted to supporters -- simply because you asked them to help you.

Canvassing

Canvassing has four primary purposes: First, to make a person-to-person contact and give information about the campaign to voters. Second, to verify information needed later in the campaign, such as phone, address, and names of voters in the household. Third, to find out if a person is a supporter, or if not, what questions or concerns are keeping them from becoming a supporter. Last, to gain a commitment from supporters to do something for the campaign.

Phone Versus Door-To-Door

A thorough job on the canvass is essential to prepare for getting out supporters on election day. There are two basic ways to canvass: door-to-door and telephone. This section will treat door-to-door canvassing in detail and section 12 will cover phone canvassing.

In going door-to-door you are meeting people face-to-face and can observe their demeanor when you inquire about support. You gain a better reading than if you can only hear a voice on the other end of the line. A well organized door-to-door effort with people walking throughout the community also gives your campaign high visability. It lets people know that you really have something going and they will want to climb on the bandwagon.

However, some people believe voters will be more candid over the phone than face to face. When phoning, follow-up is fairly automatic. Names and phone numbers remain on the list until they are contacted. In going door-to-door however, there must be a follow-up system for situations where no one was at home. This will usually be done by phone.

A door-to-door canvass can work simultaneously with a phone canvass. Those homes where no one was at home can be followed up by phone and the door-to-door effort can concentrate in high density areas leaving sparse population areas for the phoners.

Whether you choose to canvass by phone or by foot, good organization is always essential. However, you will usually need more volunteers for going door-to-door than in a phone canvass.

One additional thing to keep in mind about door-to-door activities is the weather. Rain or snow and cold can be a problem when you are asking volunteers to be outside. This does not raise the same concerns in an

office with a hot cup of coffee close at hand.

Phone banks are essential in telephone canvassing. When people phone from their homes too many problems develop. A special section on Phone Banks will help you to understand why this is important as well as how to gain maximum benefit from calling activities.

One disadvantage of calling which should be mentioned is that unlisted phone numbers pose problems.

Timing

Plan on doing your canvass during the 4th and 3rd week before the election. Complete it about a week to 10 days before the election in order to leave opportunity for follow-up and persuasion efforts. Don't do the canvass too soon -- people cannot sustain interest in an election for more than 2 or 3 weeks.

Decide the Audience

Which doors will you call on? Which numbers will you dial? Remember, you are doing more than simply dropping a piece of literature on the door step or making a short phone call. Your canvassers will need to spend several minutes with each contact. Seldom would you be able to knock on every door or call every number. Priorities will have to be established. Groups might be included or excluded on such criteria as density, percentage of school parents, past voting patterns, or other factors.

Organize Lists

Have the File Coordinator print out the names and other pertinent information needed for the canvass on individual cards for each voter. This can be accomplished by printing labels and then transferring the labels to cards which have been prepared with space for canvass information to be entered as contacts are made.

For door-to-door canvassing, the cards should be organized as "walking lists" by precinct, by street, and by street number -- even numbers in ascending order followed by odd numbers in descending order. This will enable your canvassers to park their car at one end of the street, walk up one side and back down the other to where their car is parked.

Divide walking lists into reasonable work loads. Two volunteers working together can complete about 30 visits in a two hour period -- and that's about all you will want to ask at one time. Be sure to take into consideration the nature of the neighborhoods when making these divisions. High density means less time walking and the capability to do a few more while a few less should be assigned when more walking will be required.

A Door-To-Door "Kit"

A good kit makes your campaign look well organized, gives canvassers confidence, as well as providing essential information. It should include:

* A button (With the campaign theme on it. Provides advertising and identification. Make it look good so volunteers will want to wear it and keep it for their collection.)
* Materials list (Make a list of all the materials which should be in the kit. This enables volunteers to know they have everything they should have -- or what to ask for if they are missing something.)
* Written Instructions (You are going to give them complete instructions in a briefing session, but give them something in writing to refer to when they leave and you aren't around to help. Put a number they can call on the instruction sheet -- just in case.)
* Writing Instrument (Pens are preferred.)
* Brochures in Quantity (Give them enough to hand out in the area they will be working -- plus a few extra.)
* Data Cards For Each Person They Are to Visit (These will have all the information needed to find the person as well as space to enter data needed from the canvass activity.)
* Q-Slips (For canvassers to write down any question they don't have an answer for. These will be returned to the headquarters and someone will follow up.)
* Not At Home Flyer (Something to leave if no one answers the door.)
* Q and A Sheet (With answers to some of the questions they might expect to be asked. These will include "Where do I vote?"; "Where can I register to vote?"; and other similar concerns.)
* Report Form (Each canvasser should complete a report form which indicates the number of homes contacted, number at home, number of supporters

identified, number of Q-slips to follow up on, special problems they may have encountered, and suggestions for the campaign.)

Have a nice cover to put the Kit in -- like the kind with pockets. Put your Theme on the front and back cover for even more visability.

Door-To-Door Teams

Have door-to-door canvassers work in teams of two. In this way they can reinforce each other and the job becomes a lot less intimidating. If they become comfortable enough to split up, one can do one side of the street and the other can do the opposite side -- then they will get done sooner and can come back for another door-to-door assignment. Most individuals however, need the support that comes from working with another person. It makes going to that first door a lot easier. They can also sit down and talk over special situations that develop.

You might also consider spending some time determining team composition. There is something a little threatening about two adult males appearing at your doorstep -- and there is something less authoritative about two high school students. Mix your teams up. Get people working together who will grow as a result of having teamed with someone who has a little different perspective. Let young people go home saying nice things about the retiree they went with who really does care about kids. Let the retiree go home thinking that if all kids are like the one today, this must be a super school.

Briefing Session For Door-To-Door

Most door-to-door canvassing is done on only one or two days. The entire community is covered by many volunteers within a very short time frame. To make sure this effort comes off well, insist that everyone come to a briefing session. Be ready ahead of time for those who come early. Have a greeting crew to welcome them, direct them to some refreshment, introduce them around, find them a partner if necessary, and put a kit in their hands to read through while waiting.

Have child care available so that volunteers cannot excuse themselves for lack of a sitter. This will probably be great for the children who will get a

chance to do some special and creative things -- and for the parents who need a change of pace.

Start the briefing on time. Don't cater to late comers. Tell them that they can stick around after the briefing and any questions they can't catch up on will be answered.

The agenda should be short -- but comprehensive:

* Welcome (And tell them how important this job is.)
* Go Thru Kit (Just to make sure they know what each item is for.)
* Discuss exactly what to do at the door (Role-play the situation. Make sure they know what questions to ask before leaving. Let them know how to handle questions they don't have answers to.)
* Q and A (But not more than two or three questions. Get volunteers out on the street. Invite people who still have questions to stay a minute or two and direct them to someone who will give them answers.)
* Final Send Off (Remind them to report back to campaign headquarters after they have completed their assignment. Invite them to get another assignment if they finish early. Have someone who has done this before say one or two sentences about what a terrific experience it was -- how great the people were. Thank the volunteers.)

Sample materials for the door-to-door canvass can be found in the APPENDIX area as follows:

* APPENDIX F -- Sample Q-Slip
* APPENDIX G -- Sample Not At Home Flyer
* APPENDIX H -- Sample Canvass Data Card
* APPENDIX I -- Sample Canvass Report Form
* APPENDIX J -- Sample Instruction Sheet

At The Door

The most important part of the canvass happens at the door step. Volunteers should identify themselves -- giving their names and saying they are working as volunteers for the "... Committee". A simple and short message should be rehearsed so it comes naturally. This message should say why they are there and emphasize the campaign theme.

Ask if the person has heard about the election.

Inquire whether they have any questions about the proposal. Answer any they may have -- or fill out a Q-Slip and tell them that someone will be in touch with them.

Now, the important question: "Have you made up your mind yet how you plan on voting on this proposal?" -- and if they have, this should be followed by "Would you mind telling me how you plan to vote?" Don't be concerned that people will object to being asked how they plan to vote -- it simply is not a problem. This is particularly true when you ask "Would you mind ...". If they object, they will say so. (Don't take it personally if they do object -- just say "thank you for your time.")

If they haven't made up their mind yet -- or are opposed, ask "Are there any special concerns you have that are keeping you from voting for the proposal?"

If they indicate they are supporters, thank them and ask if they would take an extra brochure and give it to a friend or neighbor.

Carefully record all the responses so that follow up activities can be handled accurately and expeditiously.

Before leaving, the names of all voters in the household should be verified, addresses and phone numbers checked, and the person should be asked if other members of the household who will be voting are likely to share their point of view. If it is likely to be different, make a special notation.

Canvassers should be advised not to tolerate hostility. They should simply leave.

Debriefing Door-To-Door Volunteers

You have asked the volunteers to complete a report form and to return to campaign headquarters. When they come back, be prepared to welcome them and to process their data cards, Q-slips, and other materials. Talk to them about their experience. Ask about suggestions they may have noted on their report form.

Have a sign-up sheet handy for other activities which need volunteers. Tell each person how much you appreciate the job they did and ask them to sign up

for another activity.

Canvass Follow-up Activities

When the data cards and Q-Slips are received back at headquarters, follow-up activities should commence. Q-Slips should be routed to persons who will either make personal contact by phone or who will draft a short reply to be given to the word processing group for final action.

All supporters should receive a brief letter (personalized if word processing capabilities permit) from the chairperson of the Citizen's Committee. The letter might say something like:

> "I was pleased to hear from one of our volunteers who stopped at your home yesterday, that you are supporting our proposal. It's nice to know that so many people care about our schools and our children.
>
> "Enclosed is a card which lists some of the jobs we still need to have done in the campaign. We really need your help. Give us a call, or put the card in the mail.
>
> "Thanks. People like you make our community great."

Persons who were identified as opponents or undecided should also receive a personalized letter which briefly speaks to concerns which were listed by the door-to-door volunteer. Word processing capabilities enable you to create a bank of paragraphs which can be drawn upon in any combination or order to build such letters.

A follow up call should be made to all undecided voters to see if they received the letter addressing their question or concern -- and to see if they have made up their mind, and if so, how they plan to vote.

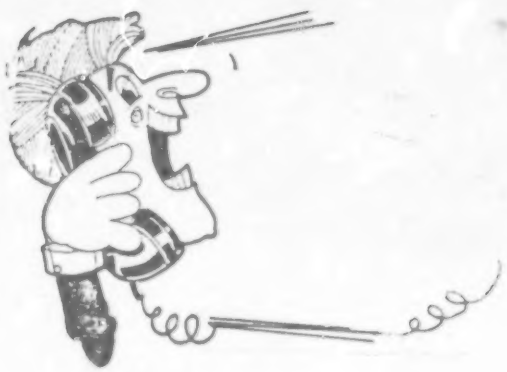
Time permitting, follow up calls can also be made to identified opponents -- but usually it will be difficult just to get through the list of undecideds. Leave the opponents until after all other priorities have been met.

Summary

Plan and carry out the canvass with great care. It is

your means of identifying supporters to turn out on election day. Consider carefully the advantages and disadvantages of going door-to-door as opposed to telephoning and devise the best possible approach for your situation -- perhaps a combination of the two. Then, be sure to prepare a kit, train volunteers, and follow-up as thoroughly as possible. Don t guess at who your supporters are -- you will be wrong too often. Do the best job possible of canvassing in order to ease the job of election day volunteers and help assure winning.

Phone Banks



Election campigns rely heavily on telephones. Among other things, they are used for surveying, calling to encourage people to register, canvassing, soliciting financial contributions, seeking volunteers for campaign activities, reminder calls prior to the election, and election day calls aimed at turning out supporters.

Use Phone Banks

Phone banks should be used for any campaign activity which involves using the telephone as opposed to letting volunteers call from their homes. Some of the more important reasons include:

* Control over work quality. Observing the comfort of volunteers in making calls, listening to their approach, hearing the responses they are giving to questions and concerns all help you to know which of the workers can handle the job. Those who can't are easily moved into other roles -- just as important, but which utilize volunteer talent to greater advantage.
* Control over work load. Knowing how much progress is being made at any point permits rapid adjustments which may be necessary to meet campaign deadlines. "We have 1500 calls yet to make and must make 150 per day in order to finish in the 10 days we have left for this activity."
* Competitive environment. Even though everyone is working as a team, there is a competitiveness about the activity. Volunteers will go an extra mile to get their calls made. Many will compete against themselves. If expected to be making about 10 calls per hour, they will work hard tc meet that goal -- and even refuse breaks to complete their assignment.
* Hostile callees aren't devastating. If a worker gets someone on the line who is hostile, it usually becomes the subject of some conversation between volunteers -- and helps to overcome the fear of making the next call. If the caller were alone, chances are very high they would never dial another number.
* Results are highly accurate. While many volunteers are conscientious, experience shows that when calls are made from homes, interruptions of one sort or another will make finishing the lists difficult. Many volunteers will guess at how someone they are supposed to call would respond -- or they will

simply make up an answer. Less damaging, but still a problem is the volunteer who shows up on deadline with only half of the calls completed -- and you don't have time to arrange to get someone else to finish the job. By using phone banks, you avoid all these problems.

Mix Business With Fun

Phone bank supervisors should insist on a no-nonsense, business-like environment. An occasional chuckle doesn't hurt, but volunteers should be pushed hard while on the phones.

At the same time, breaks should be a lot of fun. Make sure the Campaign Services Coordinator has appropriate refreshments available, and encourage a lot of socializing. One of the major reasons that people volunteer is to get out of the house and socialize with others. This is one of the most important things to remember. Then, when it's time to work again, become a task master.

Prepare A Volunteer Kit

Have kits available for each activity. Everything the volunteer will need should be in the kit, including:

* Campaign button
* List of materials in the kit
* Written instructions
* Writing instrument (pens don't break easily)
* Fact sheet if needed
* Q-Slips
* Other materials or equipment necessary to the task
* Report form

Hold A Briefing Session

A briefing session should preceed each shift. If people are veterans, they can be brought up to date on progress, given a picture of what must be accomplished, and put right to work. New-comers will need to be kept a few minutes longer to go through their kit in sufficient detail to assure they are comfortable with the assignment.

Have Extra Volunteers Available

Extra volunteers on each shift are often helpful. They can look up missing phone numbers, check report forms

to assure they are complete, identify follow-up activities necessary, process Q-Slips, and do many other jobs. In addition, it is handy to have extra persons on hand either to provide relief for someone who needs a break -- or to move in and take over for someone who just can't do the calling very well.

Use Care In Record Keeping

Record keeping in phone banks is very important. Adopt a standard coding system which can be utilized in any situation. In this way, volunteers who come back for another activity will be able to move right in and feel comfortable with the territory. APPENDIX D contains suggested coding for surveys and will probably meet most of your other needs too.

Location

Many places are available for phone banks. Schools usually have at least 4 or 5 phones in one location. Other ideas include Credit Unions, Banks, Real Estate Offices, Professional Offices, Hospital Administrative Offices, Large Businesses. Any place where you can find 4 to 10 or more phones can be utilized. Give consideration to putting your phone bank in the campaign headquarters so that your activities can be more easily coordinated. Keep in mind however, that volunteers must be cautioned to leave the desks and environs exactly as they found them. You will be guests in almost every situation and will want to be invited back.

Calling From Homes

If, and only as a last resort, you cannot find a place to have a phone bank, it may be necessary to ask people to call from their homes. CALLING FROM HOMES IS NOT RECOMENDED. However, the following suggestions may be helpful in such an emergency:

* Don't give too many calls to make (20 is at the top end.)
* Have a deadline -- and make it short. Too much time only means the ability to put off the job.
* Avoid long distance -- or be prepared to reimburse for such calls.
* Call the volunteer every day to check on progress. If they are having difficulty, collect their list and get someone else to take part of it.

Shifts

As a standard, always try to schedule volunteers for two hour shifts on phones. Most people can handle two hours with a modest break and your recruitment of volunteers is made easier when all you are asking for is two hours. You will have several who volunteer for much more because the activity is fun for them.

The best time for telephoning is 5:00 p.m. to 9:30 p.m. Do not be afraid of interrupting the dinner hour as families today dine anywhere between 5:00 and 7:30. Avoid calling later than 9:30 as well as on Friday or Saturday nights and on Sundays.

Summary

Canvassing by phone is one of the most important activities. Sometimes the entire canvass will be done by phone. Sometimes phones will be used to catch households missed during a door-to-door effort. A third possibility is that a combination of door-to-door and phone canvassing will be utilized. When door-to-door canvassing and phone canvassing will both be utilized, it will be desirable to coordinate the questionaires. A phone questionaire can be developed from the Canvass Instruction Sheet suggested in APPENDIX J -- or APPENDIX K contains a suggested canvass developed for phone use.

Challengers

Groups having an interest in the outcome of an election are entitled by law to have "Challengers" at each polling place. Your Challengers will observe the names and addresses of persons who come to vote. They then look to see if the name appears on their list of supporters, and if so, an appropriate notation is made. In this way, your campaign will have a continuing and up to the minute record as to which of your supporters have -- or have not -- voted.

NOTE: Early in the campaign, the Election Day Coordinator should obtain information on current laws and regulations governing challengers.

ADDITIONAL NOTE: Some people confuse "Challengers" and "Poll Watchers". "Challengers" is the correct designation because they are specifically defined by statute. "Poll Watchers" might be denied rights to which "Challengers" are entitled. Be sure to use the word "Challenger".

Creating Urgency

It should be your plan to begin calling our supporters about 2:00 p.m., again at 4:00, 6:00, 7:00, and 7:30 -- or until they have voted. Such an approach is necessary in order to impress upon supporters who would not otherwise vote of how important their vote will be in the election. Unless you can create an urgency for them -- and a belief that their vote will make a difference, it is very unlikely that they will show up voluntarily.

Volunteer Challengers Needed

Seven volunteers will be needed for each precinct. They will work two hour shifts beginning at 6:00 (assuming voting hours to be from 7:00 a.m. to 8:00 p.m.). The first shift begins an hour before the polls open for several important reasons:

* So that the first shift volunteers will have time to pick up all the materials that will be needed at the polling place. They cannot be ready earlier because last minute changes will be made the day before following reminder calls.
* To be on hand at the polls a little early and make sure that the challenge process is understood by the election workers and that no problems are evident.
* To provide an opportunity for the Challenger Coordinator to find a substitute in the case of

illness. This problem is resolved for other shifts by asking each challenger to stay on the job until a replacement arrives, putting in an emergency call to the Coordinator when the next volunteer fails to show on schedule.

Rules and Regulations

Challengers are protected by law as a means of assuring that parties with legitimate interests can observe the entire voting process (except they cannot see how voters cast their ballots). However, custom will vary from location to location and the Challenger Coordinator will need to make an inquiry into such laws and rules an early task -- at least 6 weeks prior to the election date.

Normally, rules permit the challenger to be seated in the election area at a location which makes it convenient to observe the name and address of persons as they come to vote. Challengers are not permitted to touch anything -- or to interfere with the election process. But, they are entitled to be protected in their right to observe the entire process and particularly the right to see the applications of voters.

Even where challengers have been utilized in the past, it is highly desirable for the Challenger Coordinator to meet with key election officials prior to the election to make sure they are aware that challengers will be on hand at the polls and to make such arrangements as may be necessary to make their responsibilities go as smoothly as possible.

The Election Day Support Voter List

A list of supporters will be provided each challenger. The list should include only those persons who will vote in that precinct and names must be in alphabetical order. This facilitates the location of voter names. Addresses should also be included -- otherwise your challenger will not know if this is the Smith on Jones Highway or the Smith on Smith Street. Phone numbers will also be necessary so that these same sheets can be used by phoners. (APPENDIX L provides a sample of such a list -- along with spaces for election day callers to make notations concerning their calling activity.)

This list being used by the challenger must be a

five-ply, with NCR paper or appropriate carbons so that a line drawn through the name will strike that name out on all of the other copies. At a little before 2:00 p.m., a runner will come to each polling place and ask the challenger to detach the bottom copy for each page of their list. This copy will be used by the phone bank while the challengers continue to cross out the names of supporters as they come to vote.

The same process is repeated at a little before 4:00. Challengers will surrender the bottom copy from each page of their list to a runner and continue marking out names of supporters on the master list.

In this way, each time a runner picks up the bottom copy, phoners will receive the most up to the minute information on who has voted. Calls will then be made only to those who haven't yet voted (unless they voted in the few minutes required for the runner to get the list to the phoners).

Challenger Briefing Session

Challengers should participate, along with all other election day workers, in a briefing session which should be held about a week before the election. They must understand how the entire process fits together and what their role in that process is. There is only one chance to get it right on election day -- everything must go as smoothly as possible.

Have kits put together with samples, instructions, identification, and other pertinent information. Challengers will need a ready reference in case questions develop. Included in the kit should be a number they can call on election day in case of emergency.

Problem Areas

It is possible in some situations for alternate means of obtaining the lists of voters to be used -- such as election workers placing carbon paper in the poll book and posting the list of voters for any group to see. However, local customs vary on such approaches. Care should be taken to assure that there will be no difficulties on election day. It will be too late at that point to make needed adjustments.

Another danger occurs when alternatives to challengers

are developed -- and then found to be unacceptable by election officials when complaints were made. You need to be prepared fully for such contingencies.

Don't Be Dissuaded

Do not be put off from using challengers by someone who says that voters will be upset by their presence. Even if you find that a voter becomes upset, it will be the duty of the election workers to point out to any protester that this is an activity which is protected by law to make sure that elections are properly conducted. Election after election demonstrates that few if any problems occur in the use of challengers.

Summary

Unless you know who comes to vote, you will severely handicap the process of turning out all your votes. Experience in hundreds of elections demonstrates that voters do not become upset with the pressence of challengers at the polls -- in fact, most voters are completely unaware that they are other than regular election workers. In any case, turning out supporters on election day is the more important concern.

Getting Out The Vote

Turning out your vote is the final test of whether you put together a winning campaign. Three major thrusts are suggested to turn out supporters:

* Working with endorsing organizations to obtain their help in contacting members and emphasizing the importance of voting.
* Reminder calls just before the election.
* Election day efforts which include up to 5 calls to supporters -- each indicating greater urgency and emphasizing the importance of every vote.

Help From Endorsing Organizations

As organizations indicate their support for your proposal, someone from the campaign needs to sit down with key leaders and work out a series of communications they will send to their membership. The last of these will be a strong appeal for a vote of support, and the importance of voting.

Such a communication should be received about 2 or 3 days before the election.

Pre-Election Reminder Calls

There are several important reasons to make a pre-election reminder call:

* To remind supporters that their vote is very important.
* To emphasize the date of the election.
* Check to see if they need to vote absentee (assuming this would still be possible).
* Encourage supporters to vote early in the day (this reduces the amount of work which will need to go into turning out your vote).
* Check to see that transportation and child care needs have been taken care of -- or to make such arrangements if a need has developed since the canvass.
* Clean your list of supporters and their phone numbers one last time.
* Have a dry run of your calling capabilities. You won't get a second chance on election day, so this is the time to test whether the volume of calls required can be made with the number of phones and volunteers scheduled. Make adjustments prior to election day if need be.

The pre-election reminder can be a simple message:

"Hello _____. This is _____ calling from the We Care About Kids Committee.

I'm calling just to remind you about tomorrow's election. We really need your support. Can we count on you to vote?"

(TERMINATE THE CONVERSATION AND CLEAN THE FILES IF THERE IS AN INDICATION OF NON-SUPPORT.)

(CHECK TO SEE IF FURTHER ARRANGEMENTS NEED TO BE MADE FOR ABSENT VOTING, TRANSPORTATION, OR CHILD CARE.)

Election Day Activities

The Election Day Coordinator is responsible for supervising all election day activities. This will include:

* Challengers (Checking off identified supporters as they come to vote.)
* Runners (To pick up copies of the supporter list from the challengers indicating who has already voted.)
* Drivers (To transport voters in need of help, give rides to runners or other campaign workers in need.)
* Sitters (To provide child care -- either in the home or at polling places -- whichever works best. A driver/sitter team is sometimes useful.)
* Callers (The phone bank coordinator should be of help here.)

Drivers

Drivers can be identified in advance and given the names of persons who indicated during the campaign that they needed transportation. Rides for these voters can be arranged ahead of time on a mutually agreed schedule. Drivers should however, anticipate they will need to be available starting at 6:00 p.m. to make emergency runs based on last minute reminder calls.

Election Day Calling

Calling requires the most organization. At least 5 calls should be planned. These should occur at 2:00, 4:00, 6:00, 7:00, and 7:30 (Assuming polls close at 8:00). Sufficient volunteers and phones will need to be identified to get through the entire list of supporters who haven't yet voted within about an hour -- provided that as you near the time polls will

close, you will need to go through the list much faster to enable several calls within the last hour.

Your strategy should be to impress supporters with the urgency of voting, but without making them mad at you for calling every hour. This can be done by using two techniques: each succeeding message must be of greater urgency, and each call must give the voter some information (this way you don't grind away with the same tired message).

A sample of messages which might be used:

2:00 Message -- "This is _____ with 'We Care About Kids'. Just wanted to call and remind you that today is election day. Be sure to vote for our kids. Thanks."

4:00 Message -- "This is _____ with 'We Care About Kids'. We just checked at the polls and we're running a little behind what we think we need to win this election for the kids. Can we count on you voting in the next hour or so?"

6:00 Message -- "This is _____ with 'We Care About Kids'. We noticed that you haven't had a chance to vote yet and we were wondering if you need a ride to the polls -- or a sitter. We really need your vote. Can you go and vote right away?"

7:00 Message -- "This is _____ with 'We Care About Kids'. Sorry to bother you again, but we've only got until 8:00 to vote and the election looks very close. Can you get right over to the polls?

7:30 Message -- "This is _____ with 'We Care About Kids'. I wouldn't call you again if it wasn't important, but we really need your vote. The election looks too close and we don't want the kids to lose by only one or two votes. _____ will be in your driveway in 5 minutes to drive you

right to the polls before they close at 8:00. Can you be ready then?"

Some problems and suggestions:

* Hostile person (Tell them you are sorry to have bothered them but you're sure they will understand that this means so much to the kids and their education that we are working overtime. Thank them and terminate the conversation. Place a mark by their name so no one calls them again.)
* Already voted (This is possible -- particularly if they voted within the last hour. The runner could have picked up the list just before they voted. Ask if they voted within the last hour and if they did, note this next to their name. See if they are marked off on the next list. If they are just telling you they voted and you know they haven't, call and try something like "Gee, maybe you better get down to the polling place and check with them because they don't have you down as voting -- and we certainly don't want to lose this election by one vote."
* I can't vote until ... (Make a note next to their name so no one calls them until after that time -- they'll just get mad if they have to give someone else the same message).
* I've gotten too many calls (Try this: "I'm sorry you have received several calls but I'm sure you can understand -- with how important this election is, and we have about 50 people down here calling. We're trying hard not to duplicate calls -- but sometimes that happens. Will you forgive us? Will you go and vote?")

When the runners bring updated lists from the polls, we have found that it works best for the phoners to continue using their original lists -- they have now made notes in the margins and we don't want to lose some of that information. They can bring their original list up to date quickly by placing the new list next to the original and crossing out the names of persons who have since voted.

Command Post

Use of a "command post" equipped with phone and CB will enable the Election Day Coordinator to get quick results. Have a few extra volunteers on hand -- just

in case.

Summary

Turning out identified supporters is the culmination of all your campaign efforts. The Election Day Coordinator is in charge, with special help from the Phone Bank and File Coordinators. The election day team must be able to work together well because there is no second chance. Election day is "winning time".

Volunteers

Volunteers are the mainstay of any campaign. From the Campaign Committee to planning and serving the victory party, volunteers will perform the tasks. From running for President to passing the local library millage, the success of any Campaign will be directly proportional to the caliber and number of volunteers who are actively involved.

In 1982, while the United States was in the middle of the worst recession/depression since the 1930's, United Way increased its total contributions by some 10%. All of this, by the way, with volunteers! The 1982 mid-year elections increased spending, in all races, local state, and national by a whopping 22%. Again, with voluntary contributions solicited for the most part by volunteers.

Basic Guidelines

The most important factor in getting volunteers is that they must be asked. You can get a lot of people to do volunteer work if you simply ask them. However, a great many more will volunteer if you will follow these five simple guidelines:

* Have a specific job in mind. Many people need to know exactly what it is you want done before they will volunteer. Many campaigns make the mistake of recruiting volunteers before specific tasks are outlined to perform.
* Be sure the job is manageable. Avoid trying to find volunteers for missions that will end in failure. People will sense such situations and resist them, or word will get around that the campaign is not being successful or not well organized.
* Assure prospects they will have everything they need to be successful -- a "kit", training, or whatever is necessary.
* Impress on those you are recruiting how important the campaign is and how much their help and talents will mean to the effort.
* Have a good time. Let people know that they will be working hard, but it's a lot of fun too.

Why People Volunteer

Volunteers do not offer their time and talent out of some mystical belief that their services are a "contribution to the community" or "cause". Few volunteers fall into this categnry.

Most volunteers will work for you or your cause for one of the following reasons:

* You asked them.
* They like you or the person recruiting them and there exists a kinship.
* The task offers an opportunity to get out of the house, away from job, spouse, kids, and meet new people.
* Your campaign offers the volunteer a chance to succeed at something -- to win.
* They are lonely and this provides an opportunity to be with other people.
* Perceived importance of the task.
* No ambiguity in task (clear, specific, managagle task of very short duration).
* Volunteering offers some an opportunity to broaden their network of influence in the community.
* Reward and "strokes".
* Fun.

If the above sounds like most people volunteer out of self interest -- you're right, they do -- and will work hard to further their perceived self-interest in your campaign if approached properly, treated with respect and given thanks for a job well done.

Where To Look For Volunteers

Some volunteers will show up on their own, but not many. Campaigns need to actively recruit volunteers and the following techniques offer some ideas for this recruitment effort:

* Ask supportive organizations to contribute volunteers. "We need 6 volunteers at campaign headquarters next Tuesday from 7 to 9 in the evening to stuff envelopes. Can the Band Boosters provide 2 volunteers for us? Can the Washington school PTA provide 2 volunteers? How about the Student Council, can you provide the other 2 volunteers?" Always ask organizations to get the names of their volunteers to you at least one day ahead of time. This enables you to arrange a reminder call to the volunter concerning when and where to report. It also provides enough time to get a replacement when someone can't make it -- or the organization doesn't produce.
* Ask for volunteers in campaign meetings -- or in meetings of groups interested in the campaign.

Don't be hesitant to wait. Silence is very uncomfortable. Someone will almost always volunteer if you are patient.
It doesn't work to say "See me after the meeting if you can volunteer." Instead, try "We need two persons to work on the brochure committee. Who can volunteer?" Then wait.

* Ask organizations that rely heavily on volunteers for a list of their best volunteer recruiters. Call on them to serve on your key committees.
* Dig out your list of volunteers from past elections (if none was kept, call around and ask who volunteered). If a person volunteers once, they are likely to volunteer again.
* Begin calling from your list of supporters (such as parents) or from a list of known supporters if available. Ask them to volunteer.
* Have pledge cards (See APPENDIX N) passed out to every audience someone from the campaign meets with. This card should have a list to check off ways in which a supporter can help.
* Call anyone. You would be surprised at the number of people who will volunteer without knowing you or even without knowing anything about your campaign.

Recruiting By Phone

The two basic ways to recruit volunteers are in person and by telephone. The telephone is faster and you can work from previous lists such as active parents, PTA's, booster organizations, etc. For instance:

"Hello! Sally, this is Mary Smith from the Pineview school area. I'm a volunteer with the Citizens for More Effective Schools and we're working to pass the upcoming millage election so our schools can keep their accreditation. We need volunteers to make phone calls to every parent. Calling will be the key factor in our campaign and that's why we need your help. Can you do some phoning for us down at Smith Realty next Wednesday afternoon from 5:00 to 7:00? It's just two hours and everyone who's been phoning finds it really interesting..."

(Sally indicates she has bridge club that evening)

"Well, we'll be calling over the next two weeks -- which night can you squeeze in to help us win? (Before allowing answer, go on)...And there's

nothing to it. The Campaign has everything really organized down there and they'll train you in just a few minutes." (Now wait for an answer).
"OK, I'll mark you down for Monday, from 7:00 to 9:00. See you there -- and thank you."

Notice that the message is designed to cover all the important bases: a clear, specific, managable task with emphasis on the importance of the effortas well as assurance that the volunteer will be trained and have everything needed to be successful.

Make Volunteers Feel Comfortable

The moment your volunteers walk into Smith Realty to telephone, greet them with a cheery hello, thank them for coming, give them quick training on what they are to do and put them to work. If you have scheduled a 7:00 p.m. session, start at 7:00 p.m.

Hand them a Kit which includes a typed script for their message which allows for some individual modification. Provide as much information as possible and give them an overall view of the campaign -- emphasizing the importance of their particular role. Keep volunteers accountable by having them record all calls; marking whether they were completed, busy signals, callbacks, not at home, etc.

Keep Good Records

Pay attention to record keeping because people who have given their services once will almost always volunteer again if asked. The name, address, phone number of all volunteers should be placed on a Volunteer Record Card and filed. A sample Volunteer Record Card can be found in APPENDIX O. In addition, be sure to record volunteers in the "File". Work with the File Coordinator on this.

Information on volunteers should be carefully guarded for the next election. You've spent a lot of time recruiting and training these volunteers -- don't throw away your greatest campaign resource.

Reward And Thank Volunteers

Volunteers are important. Treat them as important people. Keep the work area clean and bright. Have coffee, pop, tea, and some treats on hand (another activity volunteers can perform).

When a volunteer completes the assigned task, or finishes a shift, thank them again and ask when they can come back and work another shift. You will find most volunteers will return again and again.

Be sure to recognize every volunteer at the Victory Party. Thank you notes should go out regularly during the campaign -- and after it's over. Say "thanks" and then say it again and again.

Fundraising

Fundraising is basic to your campaign. You need some money and you need it now. Once your fundraising coordinator is selected, the first duty is to find some quick cash, open a checking account, keep the books and file appropriate campaign reports.

Large Contributors First

The first fundraising effort should be completed even before the organizational meeting of the campaign. Your fundraising chairperson should make a personal contact with 10 to 15 persons in the community with an appeal which goes something like this:

> "We're going to have an organizational meeting soon to start work on passing the tax measure necessary to maintain our current program. In order to get the group off and running, We need some funds in the bank. I'm in the process of contacting 10 of the key people in this community and asking them to make a contribution of $25 each to get the ball rolling. Can I count on you?"

Now you're off and running. In many communities some of the people you would approach would not hesitate to make a $50 contribution, while in others you might want to set your sights on somewhere around $10. The important point in this first effort, however, is to appeal to them on the basis that they are part of a select group -- a "key" person in your community. They will have difficulty refusing. And, if they do hesitate, suggest a slightly lower figure. You'll be successful in most cases.

Ask At Every Opportunity

Don't be bashful. Fundraisers must be nice people who are relentless about asking for money. Most people will give -- they just have to be asked. At the organizational meeting you get an excellent chance to raise some funds. At an appropriate time in the agenda, merely ask everyone to open their wallet or purse and donate $5 or $10, cash or check, to the campaign. There should be no problem raising $100 to $200 on the spot, depending on how many are at the organizational meeting.

Here are some additional ideas for raising funds:

* Approach community organizations which are actively involved in fundraising and ask for a list of their best fundraisers.

Invite such persons to serve on your fund-raising committee.

* Make certain that a large glass jar with an appropriate sign is everpresent at all functions and pre-stuffed with about $20 -- no coins please!
* Ask the superintendent to obtain $10 from every administrator. Be persistent and expect results.
* Personally visit school employee union presidents -- teachers, bus drivers, etc. Almost every teacher association has a political action committee and can easily give you $200 or more. Be urgent and persistent.
* Students can run a car wash, hire themselves out for odd jobs, child care, or a host of other activities. Be certain to assign students a fundraising task as they are creative in their ability to raise money for their campaign.

Let your imagination run wild for a few minutes on the endless possibilities which exist in orchestrating fundraisers. Don't be afraid to delegate most functions to three or four persons per event who will follow through on rather short notice.

Campaign Kickoff

You should also plan on having a campaign kickoff event. This will serve three purposes: bringing people together for the campaign, increasing media attention to the fact that your campaign has broad community support and raising money. Backyard beans and hot dogs for the whole family at $3 per person. Chili or pancake suppers all produce funds and grab a broader range of people into the campaign. These events can produce a wealth of volunteers too. Don't forget to invite the media and have a news release ready which highlights the turn-out and mass interest in support of the campaign and schools.

Ask Again

It is an unwritten rule that a person who contributes once to your campaign will contribute again. If your campaign is in a bind for funds, return to some of your original contributors. Merely explain that the campaign is close to winning but needs one final push. You are asking for an additional contribution to get over the hump. "We know we can count on you."

Summary

Every campaign needs funds. How comprehensive your particular campaign is and the budget required to finance it will determine how resourceful your fundraising must be. The key is: YOU MUST ASK.

Media

Most news media are supportive of schools and education in general. Where we often make mistakes, however, is in failing to establish a continuing and open relationship with media representatives. The media should be invited to cover meetings of the Needs Committee and the Campaign Committee meetings. Media support should be energetically sought just like that of any other major community organization.

Hold An Early Meeting With Media Persons

Prior to the Board's final action on the ballot proposal, but after formulation of a coalition recommendation to the board, a meeting should be held with editors, news directors, or other media persons. Explain the ballot proposal and invite questions. Key persons from the school/community coalition should participate in this meeting to explain the coalition's concerns and recommendations. It needs to be clear to the media that this is not an isolated recommendation from a small group or individual. They need to see that it is a consensus of a broad spectrum of concerned groups and individuals. Having a representative group from the coalition on hand reinforces the importance of the recommendation -- and is frankly helpful to have on hand when media representatives are asked for an endorsement.

Follow-Up Board Adoption Of The Proposal

Immediately after Board action on the proposal, a follow-up meeting with media persons should be held to answer any of their questions. Plans should be made to seek formal editorial endorsement of the millage proposed.

Thereafter, weekly contact should be maintained with each of the media representatives. Bring them up to date on current activities, identify coming events, and continuously reinforce your campaign theme. It is very important that you "capture" the issue in the campaign. Your theme is designed to do this. You want people (and the media) talking about your theme. Any events they cover should be related carefully to the campaign theme.

As you answer questions posed by the media, always emphasize your theme. For instance, you might be asked about a rumor that has been circulating. Your goal should be to dismiss the rumor -- or set it to rest -- as soon as possible, then turn it into a

discussion of your theme. "That's one I haven't heard. Frankly though, we're not interested in exchanging attacks between groups in the campaign -- the real issue here is whether or not we care about the children in this community. We're going to spend all our time spreading the word that 'WE CARE ABOUT KIDS'."

Encourage Early Media Coverage

You want early coverage of the campaign -- before the canvassing effort begins. Set the stage with as many voters as possible for them to identify with your campaign. Your theme should be one they can care about -- one they can believe. Get as much early visability as possible. Being first on the scene here is extremely important. You want people thinking "WE CARE ABOUT KIDS".

In-depth attention to program needs which draw attention to your campaign theme are important before minds are made up -- not near the end of the campaign when most people have already decided how they will cast their ballot.

Avoid Controversy

Controversy should be avoided as much as possible. The media will readily cover conflict and this could work against your campaign. Some guideposts which might help:

* Public hearings, meetings and/or debates give the opposition a chance to grab headlines and radio and TV time. Be prepared to counter their arguments with a positive statement.
* Public discussion about "concessions" with school labor groups should be avoided if at all possible. Post election surveys have show this is not a consideration in how the vast majority of people vote -- unless it is made an issue by school people.
* Announcing the closing of school buildings at election time can be a serious problem. Hostility is too often created among a sizable group of people who would otherwise be supporters.
* Major personnel decisions which could stir controversy should also be avoided during the campaign period.
* Major purchases should be avoided if at all possible while you are asking support for a tax

proposition. Plan better than to do this at election time.

Summary

Media coverage should always be encouraged; particularly in the time period leading up to your canvassing when most people are making up their minds. Controversy is generally a negative to your campaign unless you can focus it on the importance of education and schools. Work closely with the news media throughout the campaign. Seek their informal opinions before key decisions are made and actively seek endorsement of newspapers that circulate in the school district and of area radio and TV stations that editorialize.

School Employees

No group is more essential to your campaign than school employees. Not only are many of them (and their families) voters, but they are such an effective communicative force that they can often win the campaign for you singlehandedly -- if you put their minds to it.

Employees Communicate About Schools

A large percentage of the voters will have a "close personal friend" who is a school employee. This means that in their everyday conversations, employees are communicating about the schools to a significant majority of the community.

THE SCHOOLS ARE WHAT EMPLOYEES SAY THEY ARE. Most school employees are trusted and believed when they talk about education. If they enjoy working in the schools and think the schools are doing a good job, that message will go informally throughout the community. On the other hand, employees who are dissatisfied and disgruntled or just plain upset about something will convey their feelings even more quickly to their friends and neighbors. Survey after survey shows the impact employees have on the communities in which they live and/or work.

Whether or not an employee lives in the community is irrelevant to their having friends there. Everyone who works for the schools will have an important impact.

Work For Employee Involvement

School employees have been told for years to stay out of "politics". They are told that voters will think an employee is only out to "save their job" or "get a raise" if they become involved in the campaign. Because of this, activating participation is often a slow process.

In this regard, a survey is an important tool. It provides staff with an independent view of their relationship with the community. Most often the staff is highly thought of and the view of those who are their friends is so much different than others that they are willing to talk about a campaign role.

Naturally, each staff union or organization should be a part of the school/community coalition efforts. Their active participation as full partners in all

phases of the campaign shoud be encouraged -- and expected.

Ask For Staff Help

Meetings with staff groups should be held immediately following adoption of the ballot proposal. These meetings should be brief (20 to 30 minutes), and should cover the following:

* An explanation of the proposal.
* Opportunity for questions and answers on the proposal. Remember that the capability of the staff to talk on an everyday basis with a sizeable block of voters makes it important they know what is happening and why.
* Discussion of the importance of the proposal to the staff (this is a good place for their union representative to play a key role in the presentation).
* Emphasize the broad involvement of school and community groups and the need to continue working together.

Before concluding these meetings, staff should be asked to do some specific things:

* Talk with their friends and neighbors about a specific message that needs to be communicated. This is one of the best ways to correct misconceptions, to pass on key pieces of information and to halt rumors.
* Utilize the campaign theme where ever possible by tying it to their own programs and activities.
* Volunteer. Have a list of needs available.

The meeting should be conducted by a team which includes the citizen chairperson, one of their union or organization representatives, a student, and a management representative. Each member of this team should have a specific role in the presentation.

Summary

Bringing people together is one of the most important contributions which can be made to improving any community. Too often we are isolated into our own little groups. Campaigns provide the opportunity for teachers, students, retirees, bus drivers, parents, ministers and many others to join hands in a common effort. Not only will you be rewarded by a winning campaign, but there will be a lasting impact on the

quality of concern and respect within schools and within the community. This can only be a positive contribution to improving education for your young people.

Students

Students should be involved in the campaign -- particularly those students who are eligible to vote. This Section examines the many ways in which young people can participate.

Students Are Equal Partners

High school students should be considered as full partners on the Campaign Committee and in all campaign activities. This is important for a number of reasons:

* The student voting block is usually of sufficient size that their support can be very valuable. Students, just like other groups in the community, gain ownership through involvement.
* Student participation helps to break down barriers which are erected by some individuals and groups concerning today's youth. Community groups need to come into contact with young people to reaffirm that "our kids are worth caring about".
* Some prejudices held by students concerning "people over 30" also need to be dealt with. Bringing all age groups together in a common cause can go a long way toward seeing these attitudes change.
* This is an excellent way for young people to learn that their vote can make a difference. Perhaps over the long term, voter apathy can be reduced through early and successful experiences.

In addition to serving on the Campaign Committee, students should be asked to contribute volunteers for each of the campaign activities or sub-committees. Generally, inviting two students to serve together is helpful -- they will feel very lonesome by themselves.

Give students responsibilities just like anyone else. Expect them to participate as partners and to carry their share of the load. This will give them confidence and a feeling that their contributions are essential and expected.

Younger Students

Young students can also be involved -- helping pass out literature, stuff envelopes, providing child care and other tasks depending on their age and ability. They are not yet adults however, and a seat on the

Campaign Committee should be reserved for older students who are approaching graduation.

Do NOT use young students as a means of transmitting flyers to their parents, or otherwise "mandating" their participation in the campaign. Ask for volunteers -- there will always be plenty of them.

Registration of Students

Build in a system for assuring that all students are registered to vote as soon as they are eligible. In some schools, the government teacher assumes this responsibility while in others it is included as part of the total voter registration effort. Districts often can arrange for a member of the school staff to be deputized. In this way, parents of incoming students as well as students themselves can be registered right in the schools.

When updating the "File", add the names of any student who will be eligible to vote. Then, check those names against the voter registration lists -- making the names of any un-registered student available to the Voter Registration/Absent Voter Coordinator.

Practice Voting

For most people, voting for the first time produces a lot of anxiety. Schools can help reduce this problem for students by providing opportunity for newly registered voters to practice voting. Use the same type of balloting which will be used in the school election whether it be paper ballot, punch card, voting machine, or other method.

Schools might make the school election machinery (or mock ups) available for class elections, student council elections, or for other opportunities where students can "practice" their voting. If they have used punch card voting (or whatever method is used in your school election) throughout their high school years, voting "for real" will be just another trip to the polling place.

Class elections and other student voting opportunities can provide an even greater learning experience if student election officials, challengers, registration, and other aspects of the election are duplicated as well.

Student Events

Students sometimes want to sponsor a special event as part of the campaign -- either to rally student support or to call voter attention to school needs. Parades are a common example. In some situations, such events have even been a major reason the campaign was successful.

Generally, students are very capable of organizing their events. Encouragement and some occasional advice will usually be welcomed however. As a student event is organized, counsel leaders of the activity to make sure it is well planned. Help them anticipate and formulate ways of handling possible problems.

Turning Out Student Voters

Young voters, although they are very supportive of schools, have a very poor track record and special efforts must be made to get them to the polls. Involving them as full partners in the campaign is important, but some thought needs to go into election day activities which will increase chances these young people will cast their ballot.

Consider hosting an election eve party in the gym as well as providing pizza, pop and music. Another campaign had as many student volunteers for election day as possible -- drivers, sitters, runners, callers, challengers, serving coffee or soft drinks to voters standing in line, providing an umbrella escort from car to polling place when it rains, etc. Then, at some time during the day, they were sent to their polling place to vote. It was almost like part of their volunteer assignment.

Be creative. There are probably many good ideas which will encourage students to exercise their voting franchise. At the same time, be sure that their names are put on your "YES" voter list for election day so that they will receive phone calls just like everyone else. Your extra effort is intended to supplement -- not replace the regular election day activities aimed at turning out "YES" voters.

Summary

Students are very positive supporters, but need special encouragement to participate in the campaign and to vote. Go out of your way to involve them. Let

them know this is a responsibility of adulthood and that everyone is counting on them to do their part. In addition, look for ways to maximize the potential for getting them to the polls on election day -- reducing anxiety of voting through practice "run throughs", election day events, and other approaches. Students are part of the "school family" -- expect them to carry their share of the load as well as receive their share of the credit.

Community Organizations

Success at the polls in school elections generally results from involvement of various parts of the community in the campaign. Everyone in the community has a stake in the continued health of the schools and should be contacted on behalf of the campaign. Since people belong to many organizations in their communities it is very effective to involve the various groups, making them aware of the issues and of the necessity for passage of your proposition. In addition, each group should be asked to give support to the campaign by communicating with their membership, making a financial contribution, offering volunteer assistance for various campaign activities, and assisting in other ways where appropriate.

Know Your Community

Knowing your community and its various parts is an absolute necessity for successful community involvement in the campaign. It is critical that some time be spent analyzing your community and identifying major groups that should be asked to be a part of the Campaign Committee and otherwise give support. To assist you in this part of the campaign, a Community Information Questionaire is included as APPENDIX U.

The analysis of your community should include:

* Identification of community demography. This includes formation and development of neighborhoods; neighborhood styles, types and characteristics; patterns of land use and zoning; land values; patterns of transportation and communication; commercial and industrial characteristics; and general population information such as age, level of education, income levels, occupation, health, race, religion and nationality.
* Community power structure. The community power structure involves those persons or groups that influence community decisions. They represent either an economic, political or social interest within the community. It is important to understand how they are organized and the degree to which there is intergroup cooperation or conflict. Also, a thorough understanding of both the formal and informal power structure is essential to any meaningful effort to influence community decision making. It is often the case that the informal power structure is invisible to the public and is more important than the formal power structure

in formulating a strategy for community involvement.

* Community Life Support Systems. In thinking about your community it is important to view it as a network of interconnected life support systems such as communication, culture, employment, goods and services, housing, law and justice, learning, recreation, safety, social services, and transportation. School districts often limit their involvement in community affairs to the education system, thinking that only decisions made within the educational arena have direct consequences for them. However, the interrelatedness of the various life support systems can provide many strategic leverage points in the community which can be impacted in such a way as to affect education in general -- or, more specifically, the school election campaign.

Strategy For Community Involvement

A practical strategy for involving the community in the schools, as well as in the immediate election campaign consists of three major components: an organizational capability, contacts, and impact programs.

Organizational capability is brought into major focus through a Community Data Bank. The school district, in cooperation with school employee groups, should maintain extensive data concerning the community. Information on demographics, formal and informal leadership and power structures, as well as facts on the professional and elected leadership of the various community life support systems and their client populations. The Community Information Questionaire (See APPENDIX U) can be used as the basis for the Data Bank.

Special consideration should be given to developing a plan and time for the contacting of all community groups. Strategies should be based on concerns such as:

* What messages do we want to communicate about our schools and/or this election campaign?
* When should we meet with our various community groups to discuss the campaign and their involvement?
* How should we disruss our concerns about education in this community and/or the issues

in this election campaign?
* Who will meet with the various community groups?

A Sub-Committee of the Campaign Committee working under the Coordination of the Organizational Liaison Coordinator should be appointed to:

* Organize the Community Data Bank.
* Develop a community relations plan.
* Organize and Implement community information training sessions for staff, campaign volunteers and other interested persons.
* Develop linkages between the school district and community organizations as well as between these organizations and the Campaign Committee.
* Develop contacts with community groups interested in the schools such as business, unions, service clubs, clergy and churches, parent groups, booster clubs, recreational clubs, student groups, realtors, social service and other agencies.

Contacts of a long range nature can be developed and fostered through such activities as a Community Advisory Panel which represents a cross section of the community. This group would meet periodically with the leadership of the school district, including the heads of the various school employee groups, to discuss the status and condition of education in the local community. The panel could also provide support to the school election campaign. This kind of approach enables the school district not only to demonstrate its willingness to listen to the community, but to get important input on school issues.

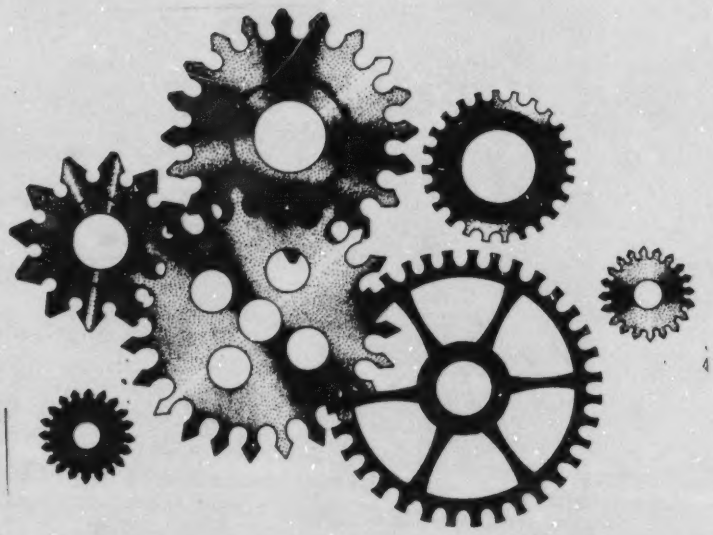
In cooperation with school employees, the school district should develop planning, policy, and program relationships with agencies of several life support systems including health care agencies, business groups, labor, community service organizations and local/state government officials.

School-Community relations impact programs will not necessarily have a direct effect upon the community decision making process as related to a tax levy campaign. However, such programs do indicate the commitment and good will of the district and school employees to maintaining good public information and community relations linkages. They can be used as an adjunct or a prelude to community involvement throughout the year as well as during a school

election campaign. Some examples are:

* New parent or pre-school parent briefing sessions.
* Communication classes for parents.
* Seminars for parents on substance abuse.
* Inviting business, labor and community leaders into classes as guest speakers.
* Recreation programs for senior citizens.
* School volunteer programs.
* Good will programs in the form of scholarships, awards, recognition dinners, and community meetings.

Post-Election Activities



Now that the election is over, your next campaign has already begun. Learn from the one just completed and work to maintain your coalition.

Thank You Notes

Don't wait. Get out thank you notes right away. Be careful to include everyone. In addition you might want to consider taking out an advertisement listing every volunteer and thanking all the people who cared enough about "Working together for Good Schools" to vote "YES".

Be sure to send special letters to the groups that endorsed the campaign and/or participated actively in the coalition. Don't forget the media.

Your thank you note might well include an invitation to participate in the ...

Post-Election Debriefing

Have all the key campaign workers, and any others who want to participate, together for a post election debriefing. Representatives from each of the endorsing organizations should receive special invitations.

You'll need about one to two hours. Start by again thanking everyone. Provide a brief historical review of the campaign -- singling out your campaign coordinators for special praise and recognition.

Have participants work in teams of six to eight persons to complete a debriefing. Three major questions should be addressed:

* What were some of the things that we did well?
* Were there some things that need to be improved or changed in the next campaign?
* What must be done now, both in terms of getting ready for the next campaign, and in terms of on-going school/community activities?

Give each group some newsprint and felt markers. Ask them to take 5 to 10 minutes to list out those things which went very well. A representative of each group should then be asked to summarize in 30 seconds the key points made by their group -- for the benefit of the entire group.

Another 10 to 15 minutes should be provided for the groups to list on newsprint those areas which should be looked at for change or improvement next time. Again, 30 second reports should be made to the entire group so that everyone has the benefit of the various discussions.

For the third task, another 10 to 15 minutes should be sufficient -- followed by the 30 second reports.

Before bringing the meeting to an end, some kind words of thanks for participating in the debriefing can be mixed with some "gag" awards to several people for humorous things which happened during the campaign -- or to remind folks of some special highlight event. Leave on a happy note.

Ask that the newsprint records for each group be turned over to a person who will transcribe them for future reference and action.

Update The "File"

Have a small work group come together to update your "File" by noting on the various cards or records those persons who actually voted. This will enable you to maintain continuing information on who votes -- or doesn't vote, and on which of your supporters turned out -- or sat home. Also check to see that all contributors and volunteers have been recorded. Such information will prove invaluable for the next election campaign.

Provide each of the employee groups with information on the percent of their membership (and families) turn out. This will help them to examine their internal programs aimed at securing membership commitment and support.

Pay Attention To Recommendations For Action

Don't let the efforts of your post election debriefing go to waste. Take each of the recommendations for things which need to be done now -- whether or not campaign oriented -- and begin working on them. This is an important part of the credibility relationship you want to establish between the Board of Education, Administrative Staff, Employees, Parent Organizations, and other school and community groups.

Summary

To a large degree, school elections are won by what is done during that time of the year that you are not involved in a campaign. Be sensitive to the continuing need for meaningful involvement of people in school decision making. Take care to listen and to tell others the "school story". Be an advocate for public education. Do the best job possible of providing education for young people and other services of the district.

Appendix A
Sample Survey Questions

1. Demographic Questions

* Do you have children of school age, or younger? (IF YES, CONTINUE) Do your children attend the _____ schools or private/parochial schools?
* Do you have any children who are not yet in kindergarten?
* Do you, or does any one in your family, belong to a union?
* How long have you lived in the _____ area? (Possible Response Categories: 0-4 years, 5-14 years, 15 or more years)
* What age group are you in? Are you under 30, between 30 and 44, between 45 and 64, or 65 or older?
* Do you have a personal friend who works for the _____ schools?
* Sex?
* Voting Behavior? (Did they vote in none, one, two, or all of the last three elections?)
* Precinct?

2. Quality of Education

* Based on what you know or have heard, how would you rate the quality of eduction in the _____ schools? Would you say that it is "excellent", "good", "fair", or "poor"?
* Based on what you know or have heard, how would you rate the quality of education in the _____ elementary schools? Would you say that it is "excellent", "good", "fair", or "poor"?

  Similar questions can be asked about Junior High, Middle School and/or High School.
* Students are often given the grades A, B, C, D, or E to describe the quality of their work. Suppose the _____ schools were graded in the same way. What grade would you give the schools -- A, B, C, D, or E?
* In your opinion, what are the main things the school system has to do to become "excellent"?
* During the past few years, would you say the quality of education in the _____ schools has been getting better, getting worse, or staying about the same?
* How would you describe the quality of education in the community where you live? Do you think it is better than in most schools in the state, not as good, or about the same as most other schools?
* What are the things you particularly like about the

_____ schools?

* What improvement would you most like to see made in the _____ schools?
* (TO FOLLOW QUESTION ABOUT WHETHER THEY HAVE A FRIEND WHO WORKS FOR THE SCHOOLS) When it comes to expressing an opinion about the _____ schools, do they usually have a very positive opinion, somewhat positive, somewhat negative, or very negative opinion about the _____ schools?

3. Planning for the future

* Thinking about the next ten years, what is the single most important thing you think the schools must either change or improve in order to provide the kind of education we want our students to get in the future? (PROBE -- BUT DON'T READ OR SUGGEST POSSIBLE RESPONSES. IF THEY LIST SEVERAL, ASK THEM TO CHOOSE WHICH THEY THINK IS THE MOST IMPORTANT AND RECORD ONLY THAT RESPONSE)
* Suppose you were graduating from high school next June. Knowing what you do now, what do you think the public schools should teach students in order to meet the needs of living in today's world?
* Are the _____ schools offering programs or services that you think should be either eliminated or cut back significantly? (PROBE -- BUT DON'T READ OR SUGGEST RESPONSES. IF THEY LIST SEVERAL, ASK THEM TO CHOOSE THE ONE WHICH THEY THINK IS MOST IMPORTANT TO REDUCE OR ELIMINATE AND RECORD ONLY THAT RESPONSE)
* Some people feel that greater community involvement would help their schools. Would the following be a great deal of help, some help, a little help, or not too much help?
  (Possible topics to ask about: Parent/Teacher Conferences, Parent/Community Volunteers in Schools, Building Level Citizen Committees, Information Meetings with Parents/Citizens, Citizens on District Advisory Committee, Citizens/Staff on Principals' Advisory Committee)
* Do you think the school curriculum in the _____ schools needs to be changed to meet today's needs, or do you think it already meets today's needs?
* Recently one state required that in order to graduate from High School, each student should be required to take a one semester course in understanding the role of computers and other technology in their everyday lives. Do you agree or disagree with this as a graduation requirement?
* To help conserve energy costs and save money, some

people have suggested that schools shorten the school week by operating four days a week instead of five, and have a longer school day each of the four days. Would you favor or oppose that plan?

* Another way of saving energy costs is to close schools just before Christmas and re-open February 1. The lost time would then be made up by starting the school year in late summer and extending the school year into early summer. Would you favor or oppose this plan as a way the schools might save money?
* I'm going to read you a list of some of the things that many school districts have traditionally offered students. Please tell me if you think each item is very important, somewhat important, not too important, or not important at all.
  (Possible items to ask about: Providing School Library/ Librarian Services, Senior High Counselling, Junior High Counselling, Providing Six Periods in Junior High and High School, Providing clubs/extra-curricular activities, Intramural Sports/Activities, Interscholastic Sports)
* Many school districts are having serious problems offering a broad program due to declining student enrollment. One way which has been suggested to help solve this problem is to combine several school districts together. Would you favor or oppose combining the _____ schools with one or more of the neighboring school districts?
* Would you favor or oppose keeping your district as a separate school district even if it meant voting to increase school taxes somewhat?
* Would you be interested in having the schools offer adult education programs on how to find jobs and how to interview for jobs?

4. Communication

* How would you rate Communication between schools and the community? Would you say it was excellent, good, fair, or poor?
* When you have a problem having to do with the schools, who would you usually go to in trying to resolve this problem? (IF THEY SAY THEY HAVE NEVER HAD A PROBLEM, ASK THEM WHO THEY WOULD GO TO IF THEY DID HAVE A PROBLEM. DON'T READ OR SUGGEST RESPONSES. RECORD ONLY THE FIRST RESPONSE GIVEN)
* What do you think chances are of getting your problem resolved? Would you say that it is "excellent", "good", "fair", or "poor"?
* How do you see the working relationship between school employees and the administration and school board?

Would you say that it is "excellent", "good", "fair", or "poor"?

* (REGARDING THE WORKING RELATIONSHIP BETWEEN EMPLOYEES AND MANAGEMENT) What do you think is keeping this working relationship from becoming good or excellent?
* Do you receive the " -- (School Newsletter) -- "? (IF YES, CONTINUE) How would you rate this publication in terms of communicating information YOU want to know about the _____ schools? Would you say that it is "excellent", "good", "fair", or "poor"?
* Have you talked about school affairs with a member of the _____ Board of Education in the past year?
* Do you feel welcome in the _____ schools?
* Do you usually feel free to approach teachers and other school authorities either to make suggestions or voice a complaint?
* Do you think your opinions are respected in the _____ schools?

5. Influence of groups and individuals

* I'm going to mention several organizations or groups. If that organization were to make a statement about education, would you tend to believe or tend not to believe what they said?
  (Possible types of organizations you might inquire about are those in your community such as Chamber of Commerce, Republican Party, Democratic Party, Board of Education, PTA, Superintendent of Schools, Ministerial Alliance, Education Association, Athletic Boosters, Classroom Teachers)
* In recent months, _____ has been actively involved in local city and township government issues. Do you think _____ should also become involved in school tax issues or other school matters?

6. Job being done

* Based on what you know or have heard, how would you rate the job being done by teachers in the _____ schools? Would you say that it is "excellent", "good", "fair", or "poor"?

  (Similar questions can be asked about administrators, the board of education, bus drivers, etc.)
* What suggestion would you make for how the teachers could improve the job they are doing?
* What was the biggest problem the Board of Education had to deal with last year?

7. Ballot proposals

* With cuts in state aid, it will require a tax increase of about 3 mills to maintain the program we have traditionally offered in the _____ schools. Would you vote for, or vote against such an increase in your taxes?
* (IF AGAINST OR UNDECIDED) Would you mind saying why?
* When the _____ schools put tax issues on the ballot, would you prefer to vote every year, or would you prefer to plan for longer periods of time and vote only every few years?
* Special education services for students who are physically, mentally, or emotionally handicapped are now provided by each local district and the Intermediate School District. To continue these services, and help reduce the local district's share of the costs, would you vote for or against a county-wide millage of up to one mill?
* Some people have suggested three different ways that property taxes for the _____ schools could be collected. Which of these three ways would you most prefer: collect all school taxes in December, collect 50% in the summer and 50% in December, or collect all school taxes in the summer?

8. Financial condition of the schools

* Thinking now about the funding of schools. How would you rate the job your schools do in using the tax dollars given them to run the schools? Would you say that it is "excellent", "good", "fair", or "poor"?
* How would you rate the financial condition of the _____ schools right now? Would you say that it is "excellent", "good", "fair", or "poor"?
* During these economic times, many of us are "tightening our belts" -- trying to do things more efficiently and more economically. Based on what you know or have heard, do you think the _____ have done a pretty good job of belt tightening -- or do you think quite a few cuts could be made and still maintain a sound educational program?
* During the next few years, do you think that school spending should remain at the current level, increase at the same rate as inflation, or decrease?
* What do you think should be done to help cover the rising costs facing the _____ schools?
* Here are some ways some people have suggested a school district might save money. Tell me if you favor or oppose each of these. (Possible Items: Have Students

Pay Cost of Driver Education, Students Pay Fee for Participation in Interscholastic Sports, Students Pay Fee for Band/Extra Curricular Activities, Parents of Students Bused Pay a Transportation Fee)

9. Campaign Issues

* If the _____ schools couldn't offer the program traditionally provided by our schools, do you think property values would be affected? Would they increase, decrease, or stay about the same?
* If you were to find out that _____ school tax rates are lower than tax rates in surrounding schools would you vote for or vote against a 3 mill increase if such an increase is necessary to have a program comparable to these other schools?
* If you were to find out that the _____ high school day would have to be reduced from 6 to 5 hours unless there was an increase in school taxes, would you vote for or vote against a 3 mill increase?
* How important is North Central Accreditation for our schools? Would you say that it is "excellent", "good", "fair", or "poor"?

Appendix B

Number of Interviews Needed for Various Populations to Achieve +-5% Error Rate at 95% Level of Confidence

Number of Registered Voters	Interviews Needed
500	217
600	234
700	248
800	260
900	269
1,000	278
1,100	285
1,200	291
1,300	297
1,400	302
1,500	308
1,600	310
1,700	313
1,800	317
1,900	320
2,000	322
2,200	327
2,400	331
2,600	335
2,800	338
3,000	341
3,500	346
4,000	350
4,500	354
5,000	357
6,000	361
7,000	364
8,000	367
9,000	368
10,000	370
15,000	375
20,000	377
25,000	378
30,000	379
40,000	381
75,000	382
100,000	383
2,000,000	384

Appendix C
Suggested Survey Phone Sheet

Data	Primary	1st Alternate	2nd Alternate	3rd Alternate
Name				
Address				
Phone				
Precinct				
Year Born				
Sex				
Voting Record				
Name				
Address				
Phone				
Precinct				
Year Born				
Sex				
Voting Record				
Name				
Address				
Phone				
Precinct				
Year Born				
Sex				
Voting Record				
Name				
Address				
Phone				
Precinct				
Year Born				
Sex				
Voting Record				

Appendix D
Interviewer Guide

YOUR ROLE IS VERY IMPORTANT

THANK YOU for being an interviewer. We've got an important job to do and we'll work hard but, we'll have a good time too.

BE NEUTRAL	Regardless of how we might feel as individuals, we need to ask each question in a neutral way without emphasizing any of the possible responses.
DON'T VOLUNTEER INFORMATION	Be sure to ask each question the same way in every interview. It's OK to repeat a question but don't change it, add to it, or explain it. If you have repeated the question several times and the person still doesn't understand say, "That's OK, Let's go to the next question."
"WELL, I DON'T KNOW"	Don't be too anxious to go to the next question if a respondent says "I don't know". A lot of people will say "I don't know" as a way of giving themselves a little time to think about their real answer. Give them a few moments to do this.
"I NEED TO TALK TO ..."	In a survey like this, it is very important that you interview a particular person -- not just anyone who happens to be available. If the person you need to talk to isn't available, ask when and/or where the person could be reached. Make a note of this so the next interviewer will know what to do.

WHO TO CALL

For each person in our sample, there will be three alternates. The primary person is the name in the column furthest to the left. If this person cannot be reached, the first alternate is the name immediately to the right of the first alternate -- and so on.

Jim Grandstand	Paul Webster	Glen Whitmore	Sam Spade
777-7807	777-8675	777-6785	777-3465

On this list, Jim Grandstand would be the person we want to interview. If Jim cannot be reached however, the next name which we would try is Paul Webster. If Paul cannot be reached, Glen Whitmore would be called. And finally, if Glen cannot be reached, we would call Sam.

CALL BACKS

Because we are only using two or three days to complete our interviews, not being able to reach a person poses special problems. If we had a longer time, we could use a procedure involving call backs on different days and at different times of day. If you get a busy signal, please let a few minutes go by before calling again. In all other situations, and after a second busy signal, go immediately to the next alternate. If all alternates have been exhausted, allow some time to elapse before trying again and then begin with the person listed furthest to the left, and repeat the call back procedure.

CIRCLE THE RESPONSE

Draw a circle around the response number which matches the response given by the person you have called.

IF YOU ARE UNSURE

Once in a while someone will give you a response which doesn't seem to fit into any of the responses listed. Just write the response in the margin and someone will work it out later.

WHEN WRITING IN A RESPONSE

Try to capsulize open ended responses into a few words but be sure not to lose the meaning of the response which was given.

RECORD KEEPING

Accurate records are essential because someone else will be picking up your list of names to follow up where interviews have not yet been completed.

Drawing a circle around a completed interview enables another volunteer to quickly see that they should not contact any other person on that line.

Seeing an "X" through a name, an interviewer knows that this number should not be called again.

Marking the date and time of calling attempts which result in a "busy signal", "no answer", or "person not at home" enables an interviewer to know whether sufficient time has elapsed before another call is attempted.

Please use the following codes:

* Completed Interview	Jim Carty 263-1122
* Number Out of Service, Person will not be at home during time of survey, or Person refuses to be interviewed	Sally Smith 362-7110
* Busy Signal	Gail Mott 346-8976
* No Answer	Tom Masters 657-9746
* Not Home	Glenda Holmes 785-9003

HELP Occasionally something unexpected will come up.

* Someone you are interviewing says they can't continue.
  Try to complete the interview. Tell them you only have a few questions to go. Offer to call back in a few minutes. If you cannot complete the interview, mark an "X" through their name and go to the next alternate.

* The person is suspicious about the survey.
  Assure the person that the survey is legitimate, that all responses are completely confidential. If they are still suspicious, tell them that they can call during business hours if they wish to verify that the survey is legitimate. Give them the following name and number to call:

  Name _____ Number _____

* The person becomes hostile
  Once in a great while, someone you call will be uncooperative, or even hostile. If this happens, terminate the call, mark an "X" through that person's name, and go to the next alternate.

GETTING STARTED You will want to read through the survey so that you are familiar with the questions and possible responses along with any special instructions. The hardest thing for most people is to make that first call so, you might want to practice with someone once or twice. Once you have done several interviews, you will be a veteran interviewer.

HAVE A GOOD TIME Interviewing is hard work, but we think you will find that it is very gratifying to participate in an important project like this and during a break in the action, we hope you will take a little time to get to know some of the other volunteers a little better. Share some of the stories which will come out of your interviews. Have a good time -- and, "Thanks."

Appendix E
Theme Ideas

Working Together For Kids
Together We Can Do It
We Can Do More
We Care About Our Children
Harrison Kids Count
Harrison Kids Are Important
Keep Our Schools
A Vote Of Confidence
Our Schools -- A Member Of The Family
Give Our Children A Future
Pride In Community -- And Schools
Good Schools For A Better Community
Give Our Kids A Better Chance
A Better Chance
Invest In Our Future
Quality Education For Quality Kids
Give Our Kids A Special Christmas Gift -- Quality Education
Make June 13th Kids Day
Vote Yes For More Haslett Pride
Save Our Schools
Keep Accreditation For Our Schools
Haslett Pride -- Yes For Education
Vote Yes For A Championship In Education
Build A Better Future
Good Education Makes Good Cents
Education -- An Investment For Big Dividends
Say Yes To Our Schools
Say Yes To Good Education
Our Schools -- No Better Investment
Keep Centerville Number One
Be An Education Booster
Be A School Booster
June 13 -- Children's Day In Highland
It Takes Two For Basic Education -- Vote Yes Twice
Kids Are The Issue
The Education Of Our Children Is At Stake
Good Education Comes First In Greentree
Our Schools -- Our Future
So Much For So Little
A Plan For The Future
Vote Yes For A New Start In Westwood
Give Our Children A Whole Education
Make A Difference
Good Education Takes Teamwork
Continue Sound Basic Education
Vote Yes For Quality Education And Fiscal Responsibility
Pay As You Go
Getting It Together
Education We Need -- At A Price We Can Afford
Our Kids -- Our Future

Appendix F
Sample Q-Slip

Q - SLIP

This Q-Slip is to be used when someone you contact in the course of the campaign has a question or concern you don't know the answer to, or a special request. Fill out the information below and turn in to campaign headquarters.

Please Print

Name _____

Address _____

City _____ ZIP _____

Question, Concern or Request:

_____

_____

_____

Your Name _____ Date _____
Called back by _____ Date _____

Comment _____

Appendix G
Sample Not At Home Flyer

SORRY
WE MISSED
YOU

We wanted to talk with you about the school election coming up on June 14th.

As you know, good schools are very important to our community.

We need your help to make sure our schools can continue to offer good basic education.

Please help us by voting yes on June 14th.

SAY YES TO GREEN LAKE KIDS.

P.S. If you have any questions, please call us at 777-4689.

Paid for by the
Say Yes To Green Lake Kids Committee
29 Green Lake Road..Green Lake, Ohio
Herb Brook, Treasurer

Appendix H
Sample Canvass Data Card

CANVASS DATA CARD
for

(Place data label here)

1. Helio, I'm _____. I'm a volunteer with "Say Yes to Green Lake Kids". We're visiting voters and providing information on the school election to make sure our children get a basic education.

   We brought a brochure for you. (GIVE THEM A BROCHURE) Our kids need your help. Have you heard about the election? Do you have any questions about the election? (ANSWER AS BEST YOU CAN OR USE Q-SLIP).

2. Have you made up your mind how you plan to vote yet? Would you mind sharing that with us?
   ____ Yes
   ____ No
   ____ Undecided

3. (IF "NO" or "UNDECIDED) Do you have any special questions or concerns that must be answered in order for you to support this proposal?

   _____

   _____

4. (YES VOTERS ONLY)
   ____ Need Absent Voter Application
   ____ Need Transportation to Polls
   ____ Need Child Care on Election Day
   (GIVE THEM A BROCHURE TO BE PASSED ON)

5. (VERIFY NAMES OF VOTERS IN HOUSEHOLD, PHONE AND WHETHER OTHER VOTERS WILL VOTE YES OR NO)

THE DATA LABEL SHOULD INCLUDE: Name, Precinct, Address, phone, and number of voters in household.

Appendix I
Sample Canvass Report Form

CANVASS REPORT FORM

General Area Worked _____

Number of Homes Visited _____

Not At Home _____

Supporters _____

Undecideds _____

Non-Supporters _____

Special Problems Encountered:

_____

Suggestions:

_____

Your Name(s)

_____ Phone _____

_____ Phone _____

Appendix J
Sample Canvass Instruction Sheet

1. Have a good time. Make friends with your team member. Be supportive. Be positive.

2. Bring the "Kit" back to headquarters -- also all Q-Slips, Data Cards, etc. so someone can follow up on your work.

3. In case you need help, call 777-4689

4. You're going to meet a lot of very nice people who will be anxious to hear from you. However, if you run into an unfriendly type just terminate the conversation and move on.

5. Your Canvass Data Cards should be organized so that you can go up one side of the street and back down the other. If not, however, you might want to put them in this order so you can end up right back where you parked your car.

6. If no one is at home leave a "SORRY WE MISSED YOU" flyer.

7. When you meet someone at the door, be friendly and courteous. Don't be argumentative. Follow the outline contained on the Canvass Data Card.

8. Use Q-Slips if you don't know the answer to a question. Tell them someone will be calling or sending the information to them.

9. Keep reinforcing our theme: "Say Yes To Green Lake Kids"

10. Be confident. We are going to win.

THANK YOU -- THANK YOU -- THANK YOU -- THANK YOU -- THANK YOU

Appendix K
Sample Phone Canvass

Hello, _____. This is _____, and I'm a volunteer with the School Citizens Committee. We're calling voters in the school district to see if they have received information on the election coming up in two weeks. I'd like to ask you a few questions.

PAUSE, BUT DON'T ASK APPROVAL. PLUNGE RIGHT IN.

1. Have you heard about the school election coming up on June 14th?

   ____ Yes Well, as you probably know ...
   ____ No

   On June 14th, voters in the Adams School District will be asked to vote 3 mills in order to maintain the current school program.

   Do you have any questions or concerns or need any information about this proposal?

   (ANSWER AS BEST AS POSSIBLE. IF YOU DON'T KNOW, TELL THEM THAT YOU ARE UNSURE OF THE ANSWER BUT THAT YOU WILL HAVE SOMEONE CALL THEM WHO CAN ANSWER THEIR QUESTION.)

2. Have you decided how you are going to vote yet?

   ____ Yes (GO TO NUMBER 3)
   ____ No (GO TO NUMBER 5)

3. Would you vote for or against the proposal?

   ____ For (GO TO NUMBER 4)
   ____ Against (GO TO NUMBER 5)

4. We appreciate your support for the proposal.

   Will you be in town on election day or will you need an absent voter application?

   ____ Need Absent Voter Application

   Will you need help with transportation to the voting place -- or child care while you go to vote?

   ____ Need Transportation
   ____ Need Child Care

   (IF ANY OF ABOVE ARE NEEDED, TELL THEM SOMEONE WILL BE IN TOUCH TO MAKE ARRANGEMENTS WITH THEM)

(4. Continued)
Can you also help us by ...(ask them to volunteer for some upcoming campaign activity or to contribute funds. Your phone bank supervisor will give you a list of current needs.)

(GO TO NUMBER 6)

5. Do you have any particular questions or concerns that must be answered in order to support this proposal?

_____
_____
_____

6. Just a couple of final questions:

(HERE VERIFY PERTINENT INFORMATION ABOUT NUMBER OF VOTERS IN THE HOUSEHOLD, ADDRESS, ETC. RECORD CHANGES WHICH SHOULD BE MADE ON THE DATA CARD.)

7. Thank you for your help.

Appendix L
Sample Election Day Yes Voter List

List of Identified Supporters For Precinct 6

Caller Notes 2	4	6	7	X	Name	Address	Phone
					Amy, LeRoy	1234 Sunny Street	555-1234
					Baker, Jill	234 Moon Ave	555-2314
					Baker, Pete	234 Moon Ave	555-2314
					Cartwright, Wm.	4326 Sweet Street	555-7643
					Cartwright, Wm.	56 Sour Road	555-7856
					Crown, Sue	564 River Street	555-5324
					David, Marilyn	97 Dream Ave	555-2356

NOTES:

* This list should be 5 ply -- enough for 5 phone calls if needed.
* Leaving space in the margin for callers to make notes in each calling period (2 o'clock, 4 o'clock, 6 o'clock 7 o'clock, and 7:30) will enable easy updating and permit volunteer phoners to know the history of calls which have been made to our "YES" voters.

Appendix M
Suggested Format For "The File"

Name _____ Precinct _____
Address _____
City _____ State _____ Zip _____
Phone _____ Birth Date _____

Registered ____ (Y=Yes)
Graduate ____ (Year of Graduation from our schools)
Parent ____ (Year of Expected Graduation for Youngest)
Employee ____ (E=Employee, S=Sub, O=Employed by Other District, F=Family Member)

____ (If an employee, enter employee unit code A=Aide, B=Bus Driver, C=Custodian, K=Kitchen, M=Management, S=Secretary, T=Teacher)

Last year of involvement in:
Booster Organization ____ PTA ____ Community Ed ____

	Election Number							
	1	2	3	4	5	6	7	8
Worker	____	____	____	____	____	____	____	____
Contributed	____	____	____	____	____	____	____	____
Supporter	____	____	____	____	____	____	____	____
Voted	____	____	____	____	____	____	____	____

NOTES:

* Keep track of who worked in the campaign by marking a "Y" in the space for the appropriate election.
* The amount of contribution should be entered. If more than one contribution was made, enter the total of the contributions.
* Supporter code: Y=Yes N=No U=Undecided.
* If the person voted mark the blank for the appropriate election with "Y".

Appendix N
Sample Pledge Card

Make Your Vote Count For Kids
Pledge Card

YES, you can count on me to Make My Vote Count for Kids.

Name _____

Address _____

Phone Number _____

(Check all of the following that apply)

____ You can use my name as a supporter.
____ I will make a financial contribution of $ _____.
____ Call on me to do volunteer work. I would be willing to do the following:

____ Calling
____ Canvassing
____ Hospitality
____ Challenger
____ Office Work
____ Other _____

____ Child Care
____ Writing
____ Speaker's Bureau
____ Driver
____ Anything

Appendix O
Sample Volunteer Record Card

Volunteer Record Card

Name _____
Address _____
Phone _____ Precinct _____
School _____

Record of Volunteer Activities

Date	Activity	Comment
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Appendix P
Sample Eight Week Campaign Calendar

NOTE: An entire year should be devoted to the kind of campaign described in this book, and most of the Sections are predicated on such a timeline. However, many campaigns do not have the luxury of time and this eight week calendar is offered as a guideline when time is at a premium.

The following time table is listed in chronological order, starting with the eighth week before election day. When planning your campaign however, you should start on election day and work backward.

Week 8.

* Solidify coalition of key groups.
* Organize citizens committee.
* Identify key campaign coordinators.
* Update file of prospective "yes" voters.
* Pull sample for public opinion survey.
* Design survey instrument.
* Identify volunteer interviewers for the survey.
* Arrange Phone Bank for survey.
* Arrange for surveys to be processed and analyzed and a report prepared.
* Analysis of past elections and current situation.
* First meeting of campaign steering committee.

Week 7.

* Conduct Interviews for survey.
* Process and analyze surveys.
* Prepare report of survey results.
* Complete basic coalition building.
* Voter registration is underway.
* Campaign funds are solicited from at least 10 major contributors (these will be large contributions of at least $25).
* Fundraiser(s) planned to raise additional funds.

Week 6.

* Meeting of coalition to receive survey results and election analysis. Also to agree on a proposal everyone can support.
* Board meets and ratifies agreement of coalition on proposal. Sets in motion all legal

requirements related to election notifications, etc.
* Campaign meeting to set theme, agree on the campaign plan, and make work assignments.

Week 5.
* Meetings held with all editors, news directors and other media representatives to explain proposal and ask their endorsement.
* Complete voter registration efforts.
* Basic campaign brochure developed and printed.
* Meetings are held with all staff groups to go over details of the proposal and to ask staff help.
* Meetings are held with all other school groups to go over details of the proposal and to ask their help.
* Plans for fundraisers finalized.

Week 4.
* Fundraisers held.
* Kits needed for canvassing developed and printed.
* All plans for canvassing finalized and volunteers identified.
* File updated with newly registered voters.
* Lists prepared from the file for canvassing. Lists are prioritized.
* Challengers have been identified.
* Information on challengers has been obtained and legal requirements arranged.

Week 3.
* Begin canvass to identify "yes" voters.
* Intensification of meetings with various community groups to explain proposal and ask their endorsement.

Week 2.
* Canvass to identify "yes" voters is completed.
* Follow-up work with undecided voters intensified.
* Reminder call volunteers identified.
* Volunteers for sitters, drivers, runners, etc. obtained.
* Election day callers identified.
* Kits completed and printed for election day

workers.

Week 1.

* Begin passing the word that opponents may attempt eleventh hour scare tactics and rumors. Remind supporters that this is a common approach used to try and confuse our campaign. We must not succomb.
* File is updated with all names of "yes" voters identified.
* Final persuasion efforts made with undecided voters.
* Training session held for all election day workers (Challengers, sitters, runners, drivers, callers, etc.).
* List of "yes" voters is printed out for use in making reminder calls.
* Victory party arrangements finalized.

Week 0.

* All volunteers and contributors are invited to the victory party.
* Reminder calls made.
* List of "yes" voters is prepared for each precinct from the file of "yes" voters.
* Election day adjustments made on basis of reminder calls and other last minute information.
* Election day -- (hardest working day of the campaign).
* Victory Party.

Post Election Activities.

* Thank you notes are sent to all workers and to all contributors.
* Meeting of all campaign workers to debrief the campaign, list changes which should be made in the next election, and make other suggestions for activities which need attention prior to another campaign.
* File is updated with information on persons who voted.
* File is updated with information on persons who volunteered and/or contributed to the campaign.
* Post-election financial filings made as required by law.

Appendix Q
Pre-Election Evaluation Guide

1. Steering Committee
   1. Have Campaign Co-Chairpersons been identified and agreed to serve?
   2. Are Coordinators "on board" for the following areas:
      Organization Liaison
      File Management
      Survey/Canvass
      Election Day
      Phone Bank
      Voter Registration/Absent Voter
      Media/Printed Materials
      Campaign Services
      Fundraising

2. Volunteers (See Section 15)
   1. Can lists of volunteers from past campaigns be obtained?
   2. Are there school organizations that rely heavily on volunteers and can names of their best volunteers be obtained?
   3. Are there community organizations that rely heavily on volunteers and can names of their best volunteers be obtained?
   4. Are there lists of supporters from past elections that might be good sources of volunteers if they were asked?

3. Training For Key Campaign Personnel
   1. Are there persons available who have received training in election campaigns or who have been active in such campaigns?
   2. What workshops will be offered by state education organizations or others which will provide information on how to run school campaigns?
   3. What information on how to run campaigns is on hand or available?

4. Computer Capability (See Sections 6 and 10)
   1. What computers are available for use in the campaign?
   2. Can a high speed printer be made available for use with the computer?
   3. Is there a letter quality printer available for campaign use in conjunction with the computer?

4. Is comprehensive word processing software on hand that will permit high volume personalized mailings during the campaign?
5. Is the computer capacity sufficient to manage the campaign files on voters/prospective voters?
6. Is data base management software available to provide high speed sorting and handling of campaign files on voters/prospective voters?
7. Can this software provide mailing labels?
8. Will available software provide lists of names and phone numbers in a priority order which can be selected on the basis of information in the file (ie. parents, then pre-school parents, then community education participants, etc.)?
9. Can the software provide lists of identified supporters arranged alphabetically by precinct for election day?
10. Can this software provide walking lists for door to door canvassing if needed (sorted by street and arranged in ascending or descending order based on house number)?

5. Opposition Groups
   1. Are there existing groups which are (or will be) opposed to any tax measure?
   2. What groups existed in past elections?
   3. Is there information available on leaders of opposition groups?
   4. Are opposition group leaders still active?
   5. What groups exist which might lean toward being opposed and who are their leaders?
   6. Are there ways of involving or communicating with potential opposition groups in order to either gain their support or to neutralize them?
   7. Did opposition groups file legal documents concerning their campaign revenues and expenditures and do we have copies?
   8. What information concerning individuals who contributed to opposition campaigns is available in campaign reports?
   9. Are there newspaper accounts of past campaigns which might reveal information on opponents or prospective opponents?

6. Campaign Headquarters
   1. Is a campaign headquarters available?
   2. Is it in a safe location?
   3. Does it have telephones?

4. Are clean restrooms available?
5. Is there sufficient parking?
6. Can the space be secured to protect materials and equipment?
7. Is there room and electrical outlets for typewriters, computers, printers, duplicating and other equipment needed in the campaign?
8. Are desks, chairs, shelves, and other furniture which might be needed available?
9. Do we have staplers, three hole punch, pencil sharpener, and other basic office equipment?
10. Is there space to hold small meetings?
11. Can the headquarters area accomodate a phone bank if we decided to install one, and how many phones could be put into the space?
12. Will there be a problem in putting charts and other information on walls?
13. Is there a chalkboard?

7. Surveys (See Section 7)
   1. Have surveys of public opinion been done in the past and what information from them might be helpful?
   2. Have other organizations in the community done surveys which might be helpful in the campaign?
   3. Are there persons available who can provide technical advice and/or assist in developing a survey instrument, drawing a sample, or analyzing survey data?
   4. What computer services are available to process survey data and perform statistical analyses?

8. Past Election Results
   1. Is there a comprehensive history of past election results?
   2. Have there been changes in precinct boundries which need to be considered in analyzing results along precinct lines? What are they and when did they occur?
   3. What do past election results say about the location of support groups, swing voters, and, variations in voter turnout from precinct to precinct?
   4. What past elections are most similar to the one coming up?
   5. What changes in community growth, expansion, or other population shifts have occurred since past elections were held and what do these changes mean for our campaign?

6. What is the highest number of "NO" votes from past elections?
7. Are there conditions presently which would be likely to substantially increase the base line "NO" vote?
8. Do we know how many of the persons who have been identified as "YES" voters in past elections actually voted?
9. Have we worked through an analysis of how many "YES" voters must be identified prior to election day in order to have a high chance for success (See Section 3, "Getting Organized")?

9. File of Voters/Prospective Voters (See Section 6)
   1. Is there a file of voters and prospective voters from past elections?
   2. Has this file been kept up to date, and if not, what information needs to be added or verified?
   3. Is the file computerized and if not, how can this be accomplished?
   4. Is there someone in the community with the computer background to help us build and maintain such a file?

10. Fundraising (See Section 16)
   1. What funds remain from past campaigns?
   2. What are the names of 15 to 20 persons in the community who would make an initial contribution to the campaign of at least $25?
   3. How much money has been raised in past campaigns?
   4. How much will be necessary to raise in this campaign (See Appendix V)?
   5. What school/community groups are involved in extensive fundraising efforts, and who are their best fundraisers?
   6. Can we get some of the best fundraisers to help us raise money for our campaign?

11. Legal Filings
   1. What filings will be required for a campaign of this nature?
   2. Who has had experience in making such filings?
   3. Can we get them to handle our filings this time?
   4. Are there copies of filings from past elections?

5. What helpful information can be gleaned from past filings?
6. Have opposing groups made filings in the past and what information is helpful from those filings?
7. Is there an existing committee or will we need for form a new committee?

12. Communication Systems
    1. What systems of communication now exist within the community?
    2. What newspapers do people in the community subscribe to?
    3. What percentage of the community has a personal friend who works for the school?
    4. Do we have a newsletter or other existing communication device?
    5. Who are the most effective communicators and can we get them to assist us in this campaign?
    6. Do people in this community rely on radio or TV for information about the schools? Which electronic media outlets?

13. Media Relations (See Section 17)
    1. What media cover the district?
    2. Who are the reporters or others who are responsible for school news coverage?
    3. Who are the editors, news directors, or others responsible for editorial policy?
    4. What has been the nature of media coverage in the past few months?
    5. How has the media covered past campaigns?
    6. Was editorial support obtained?
    7. Who in the school has been responsible for media relations and what is the nature of the existing relationship?

14. Conflict Areas
    1. Is the school labor-management relationship marked by continuing conflict, and if so, how can this be mediated to effect a resolution so that school employee groups will be active members of the Campaign Committee?
    2. Has the community become divided over an action taken by the Board of Education or member of the staff, and if so, how can this issue be brought to rest?
    3. Are there groups in the community which are raising issues of a conflict nature and how

can these issues be resolved?

4. Is there a personality associated with the schools who is a source of division and/or conflict and how can this be dealt with?

15. Consultant Assistance

1. Would it be helpful to obtain consultant assistance with:
   - Developing a Campaign Theme and Plan?
   - Reaching consensus on a ballot proposal?
   - Conducting a needs assessment?
   - Survey instrument development?
   - Drawing a sample for the survey?
   - Survey data processing?
   - Survey data analysis and report?
2. Where is consultant assistance available and what costs might be involved?

16. Community Organizations (See Section 20)

1. What lists are available of community organizations?
2. Are lists available of community groups from the past campaigns?
3. What groups are associated with the school, or utilize school facilities?
4. Who are the leaders of these groups?
5. What self-interests of these groups are affected in a positive way by the schools or school services.
6. How can the schools expand their ties to other community groups and build an interdependent relationship?

17. Community Involvement in Schools

1. How does the school involve individuals and community groups in school activities now and how can this be expanded?
2. Are there groups who do not now have ano involvement with the schools who could have and how can this be brought about?
3. Is there a systematic means of keeping track of individuals who are involved with the schools?

Appendix R
Sample Charge To Needs Committee

The major task of this Needs Committee is to prepare recommendations for the next five to ten year period concerning curriculum, staff, facilities, and major equipment or materials needs of our school district.

In developing these recommendations, consideration should be given to:

1. Recent national reports on education such as _____, and _____.
2. Projected job market needs for our geographic area.
3. Comparisons with other schools which might be appropriate.
4. Proposed modifications in accreditation standards.
5. Other information the Committee believes relevant.

The Committee should complete its work and report to the Board of Education by February 1.

Appendix S
Sample Needs Committee Invitation Letter

(Today's Date)

Dear _____,
Thank you for agreeing to serve on the "Committee to Study School Needs". This is one of the most important activities for our schools and your help is very much appreciated.

Studying long range needs of the district and making recommendations to the Board of Education for school needs over the next five to ten years will be our major goal. A copy of the specific charge given our committee is enclosed.

Our first meeting will be held next Tuesday evening, (Insert Meeting Date) at 7:00 in the Board of Education Office Meeting Room -- and we anticipate one meeting a week to complete our task by February 1 as requested by the Board of Education. We look forward to seeing you there.

Sincerely,

Cynthia Wachtel
Co-Chairperson

Bob Brown
Co-Chairperson

Appendix T
Budget Development Guide

Campaign Office

Rent	_____	
Heat	_____	
Lights	_____	
Water	_____	
Custodial Services	_____	
Phone Service	_____	
Phone Bank	_____	
Furniture	_____	
Equipment	_____	
Materials	_____	
Sub Total		_____

Computer Capability

Computer	_____	
Printer	_____	
Word Processing Software	_____	
Survey Processing Software	_____	
Data Management Software	_____	
Diskettes	_____	
Paper/Mailing Labels	_____	
Sub Total		_____

Campaign Planning

Training for Campaign Leaders	_____	
Planning Meetings	_____	
Consultant Assistance	_____	
Sub Total		_____

Written Materials

Brochure	_____
Fact Sheets	_____
Newsletters	_____
Training Kits	_____
Voter Registration Materials	_____
Survey Materials	_____
Canvassing Materials	_____
Election Day Materials	_____
Absent Voter Materials	_____
Media Releases	_____
Flyers	_____
Specialized Mailings	_____
Thank You Notes	_____
Correspondence	_____

Sub Total _____

Campaign Services
- Victory Party
- Refreshments for Meetings/Activities _____
- Child Care Expenses _____
- Transportation Expenses _____
- Sub Total _____

Fundraising
- Checking Account Expenses _____
- Fundraiser Overhead Expenses _____
- Sub Total _____

Appendix U
Community Information Questionaire

1. Population _____

2. Congressional District _____
   Congressman _____
   Key Staff Person _____

   State Representative District _____
   State Representative _____
   Key Staff Person _____

   State Senate District _____
   State Senator _____
   Key Staff Person _____

3. Racial Composition of the Community
   White _____
   Black _____
   Hispanic _____
   Native American _____
   Foreign Born _____
   Other _____

4. Percent of Labor Force in Occupational Categories
   Professional/Technical _____
   Managers _____
   Clerical _____
   Sales _____
   Craftsman, Foremen, Operators _____
   Laborers, Manufacturing _____
   Laborers, Farming _____
   Service Workers _____

5. Distribution of Employment in Local Economy
   Manufacturing _____
   Service Industries _____
   Agriculture and Mining _____
   Retail and Wholesale Trade _____
   Transportation, Communication,
   Utilities _____
   Construction _____
   Finance, Insurance, Real Estate _____

6. Tax Rate

County Allocated _____
Extra Voted _____
Other (ie. Authorities, _____
Bonded Indebtedness) _____
Township or City Allocated _____
Extra Voted _____
Other _____
_____
Community College Allocated _____
Extra Voted _____
Other _____
_____
Schools Allocated _____
Extra Voted _____
Other _____
_____

7. Children in Public Schools _____
Children in Private Schools _____
Teachers in Public Schools _____
Teachers in Private Schools _____

8. Owner-occupied Homes _____
Rented Housing Units _____
Trailer Park Units _____
Subsidized Housing Units _____

9. Life Support System - Major Agency (Public or Private)

Area	Agency	Top Executive
Communication		
Radio	_____	_____
	_____	_____
	_____	_____
Television	_____	_____
	_____	_____
	_____	_____
Print Media	_____	_____
	_____	_____
	_____	_____
Cultural Groups	_____	_____
	_____	_____
	_____	_____
Employement Serv.	_____	_____
	_____	_____
	_____	_____
Commerce	_____	_____
	_____	_____
	_____	_____

Public Health

Private Health

Homeowners Groups

Public Housing

Real Estate

Law Enforcement

Judicial Jurisdictions
District Court

Probate Court

Circuit Court

Recreation

Social Services

Transportation

Unions

Safety

Service Clubs

Youth Groups

Churches

Social Clubs

Other

10. Local Public Officials:

Township			City
Supervisor			Mayor
Clerk			Council Member
Treasurer			Council Member
Trustee			Council Member
Trustee			Council Member
Trustee			Council Member
Trustee			Council Member

11. Key Governmental Administrative Officials

Name	Position - Department

12. Power Structure (Identify Five Names in Each Category)
Formal (Elected, Public, Etc.) _____
_____
_____
_____
_____

Informal (Behind the scenes) _____
_____
_____
_____
_____

13. The Three Most Significant Or Powerful Community Organizations:
_____
_____
_____

MICHIGAN STATE BOARD OF EDUCATION

STATEMENT OF ASSURANCE OF COMPLIANCE WITH FEDERAL LAW

The Michigan State Board of Education complies with all Federal laws and regulations prohibiting discrimination and with all requirements and regulations of the U.S. Department of Education. It is the policy of the Michigan State Board of Education that no person on the basis of race, color, religion, national origin or ancestry, age, sex, marital status or handicap shall be discriminated against, excluded from participation in, denied the benefits of or otherwise be subjected to discrimination in any program or activity for which it is responsible or for which it receives financial assistance from the U.S. Department of Education.

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